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## **Tracking Patients and Staff**

### **Tracking Patient Flow and Staff Activity**

#### **Tips for Gathering Good Data:**

- Try to capture patient's arrival time, not check-in time.
- Be sure to document every time the patient is in contact with a staff person.
- You may also want to document tasks like paperwork, i.e., mark the "time in" when patient receives paperwork and the "time out" when they return it to staff.
- Cycle time ends when the patient leaves your clinic. It does not include post-visit charting. You may still document time it takes to do post-visit charting during tracking.
- It is recommended that you collect data over the equivalent of 2 weeks of clinic time, to minimize the impact of extraordinary situations on overall averages.
- Study your data to explore why back-ups or bottlenecks occur. Are the NPs ever waiting for patients? Were there a lot of "drop-ins" preceding the patient you are tracking? Write it all down!

## TRACKING PATIENT FLOW

1. Date: \_\_\_\_\_

2. Patient ID: \_\_\_\_\_

3. Appointment:       Yes                       No

4. Visit type:     Initial               Annual               \_\_\_\_\_

5. Arrival time: \_\_\_\_\_

6. Departure time: \_\_\_\_\_

7. Stops:

- |                                      |                                      |                                      |
|--------------------------------------|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Eligibility | <input type="checkbox"/> Education   | <input type="checkbox"/> Post        |
| <input type="checkbox"/> Lab/vitals  | <input type="checkbox"/> Exam        | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |                                      |

8. Special Comments:

9. Optional:    Stop \_\_\_\_\_    Time in \_\_\_\_\_    Time out \_\_\_\_\_    Staff initials \_\_\_\_\_