Florida's BRITE Project

Florida's Screening, Brief Intervention, and Treatment for Elders (BRITE) Project

Business Process Analysis Workbook

Department of Children and Families, Substance Abuse Program Office

INTRODUCTION

This Manual is intended to guide you through a Business Process Analysis for the Florida's Screening, Brief Intervention and Treatment for Elders (BRITE) initiative.

A Business Process Analysis is a structured way to obtain information about a clinic or hospital unit's operating routine. It guides the BRITE team's effort to design a protocol to implement BRITE in a specific setting, while being sensitive to the workflow and logistical support issues of that particular setting.

The BRITE initiative provides for considerable flexibility, while maintaining fidelity to a few principles. First, BRITE should be implemented in the general health setting with the greatest practical involvement of the primary care team. A decade of research supports the powerful motivational influence of primary care providers on their patients' behavior change. The evidence suggests that a Primary Care Provider's (PCP) inquiry about heath habits and concern about risky behavior is an effective tool to arrest or prevent harmful health consequences. This principal does not direct that the primary care provider must bear the entire burden to implement BRITE. On the contrary, like other health interventions the BRITE screening and brief intervention activities should be the shared responsibility of other members of the primary care team according to the nature of the task. For example, while it is essential for the physician to make a brief inquiry into substance use habits and to use good clinical judgment based on the patient's response, a physician extender would be the most appropriate team member to provide in-depth screening and brief educational interventions or advice. The BRITE provides a facility the opportunity to hire additional health counselors to accomplish those roles, as well as the training and consultation to promote effectiveness.

Another basic BRITE principle is that the clinical focus should never take a back seat to administrative tasks. Consequently, BRITE provides technology support for these requirements and considers ways to insulate the primary care mission of screening and brief feedback from them.

The third fundamental BRITE principle is that primary care providers should have seamless, direct links for their patients between problem identification and interventions. BRITE has a range of such interventions for the problematic substance misuser or abuser, and a system to facilitate and monitor referrals to specialized treatment services when more serious problems are revealed during screening.

These three principles give considerable latitude to how BRITE is implemented in a specific clinical setting. Consequently, it is essential to understand each clinic's unique operation and patient characteristics before the BRITE Team can recommend a protocol.

This workbook will take you through the structured approach to Business Process Analysis. It is developed around a semi-structured interview designed to gather as much information as possible in a relatively brief time.

WHO SHOULD A BRITE BUSINESS PROCESS ANALYSIS INVOLVE?

Generally, the Business Process interview should be attended by senior clinical and administrative staff who can explain how their health care system operates on a routine basis. Ideally, a member from each sector of the health care team should be represented—primary care provider, nursing or medical assistant staff, and a member of the administrative staff. Each of these individuals has a valuable perspective and a unique knowledge of the facility's operation. The group should include someone who can describe patient statistics such as the average number of adults served per day, the annual caseload, and the estimated number of non-repeating patients in a typical month. These numbers are important for estimating the BRITE workload and the associated resource requirements at the facility.

THE PROCESS ITSELF

There are three parts to the BRITE Business Process Analysis. The first part consists of modeling the clinic or unit workflow by describing a typical course of an appointment from a patient's arrival to departure. When this workflow description is complete, the next step is to identify specific individuals who are involved in the clinic/unit's operation, and their relationship to the process. The third part is a description of the operational and logistical support system- clinic hours of operation, access to fax, telephone and Internet, how patient records are maintained, etc., as well as the estimated number of patients served by the primary care system.

These elements are determined through a semi-structured interview with a set of questions pertaining to each part of the analysis. The following sections will describe in detail this approach.

STEP 1- Workflow Analysis

Goal: To create a flow chart that accurately describes the movement of patients through the clinic's health care process, from arrival to departure.

Method: The following questions address the clinical workflow:

1. Does the clinic operate on a fixed appointment or a walk-in basis? If both, what is the mix between appointments and unscheduled visits?
2. How does the client report or sign-in to the primary care visit? Who is the first person the patient meets upon arrival?
3. What is a patient's average waiting time before seeing the doctor?

4. Describe the patient's movement through the clinic during his or her clinic visit. Fill in the boxes to list the various places and approximate times spent in each setting. For example:

```
┌─────────────────────────────────┐
│   Check in at reception desk     │
│          (No wait)               │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│   Remain in waiting room area    │
│       (About 10 minutes)         │
│                                  │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│       Examination room-          │
│       Nurse's preparation        │
│        (About 5 minutes)         │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│      Medical consultation w/     │
│       Primary Care Provider      │
│       (Averages 15 minutes)      │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│     Return to Reception Area-    │
│          Billing, etc.           │
│                                  │
└─────────────────────────────────┘
```
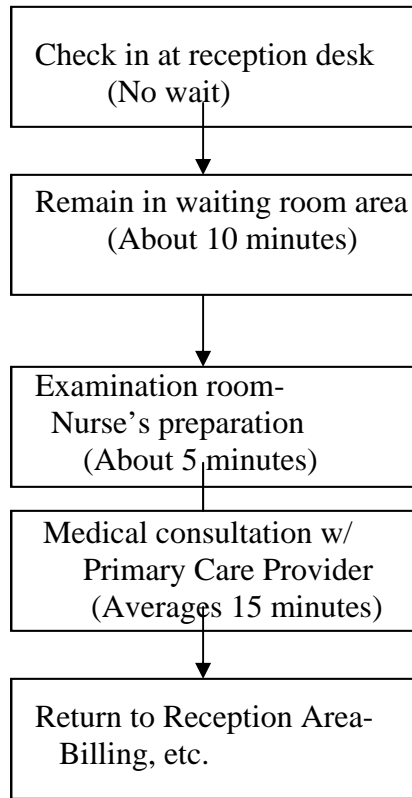
Use the Patient Flow Diagram on the following page to document your work.

PATIENT FLOW DIAGRAM

REMARKS:

How long?

How long?

How long?
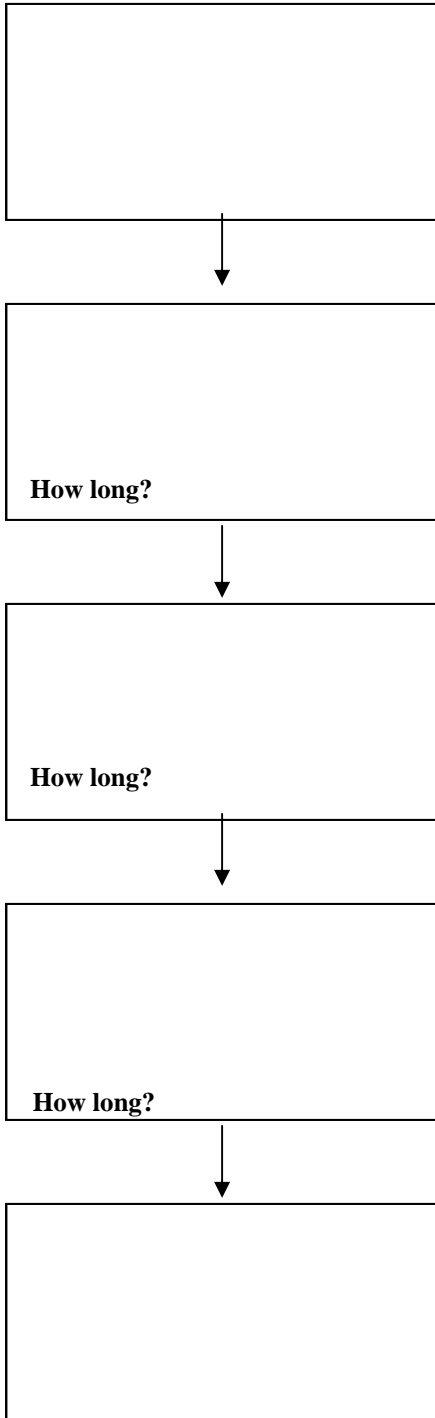
STEP 2- STAFFING

Goal: To identify individuals who interact with the patient during his or her appointment in order to specify BRITE training needs.

Method: List the clinical and administrative staff who routinely have patient contact:

Primary care providers
       Name   (Full time/ Part Time (include days)

Nursing and ancillary care staff:
       Name   (Full time/ Part Time (include days)

Administrative staff (reception/scheduling):
       Name   (Full time/ Part Time (include days)

STEP 3- OPERATIONAL DETAILS

Goal: To identify details of the clinic's routine operation and telecommunications and information support systems.

Method: The following questions address clinical operating issues:

- What are the clinic's usual operating hours?

- What is the size of the older adult patient population, 60 yrs old and above, served by the clinic in a typical year?

- How many (unduplicated) patient visits occur in a typical year?

- How many new adult patients are added to the clinic's practice in a typical year?

- What are the demographic characteristics of your clinic's patient population?

- Do you operate any specialized adult programs, such as a prenatal care program?
- Please describe:

- Are patient medical records maintained in paper or electronic format? Please elaborate if appropriate.

- If health risk screenings were offered to your patients, would the forms used to collect this information be included as part of the patient's medical records?

- Does the clinic have Internet access?

- Is the clinic telephone system analog or digital?

- Do you use fax machines in the clinic?

- What clinic space would be available for patient consultations by an additional staff member?

ISSUES/CONCERNS/QUESTIONS

Use this section to document staff discussion that has not been covered in the semi-structured interview process.   Include the clinic's concerns and issues about BRITE as well as who expressed the issue, the degree of urgency, and the expectations or commitments that were made by the BRITE team in response.

Issue or Concern	By Whom	Urgency?	Comments (Include expectations or commitments from BRITE Team)

BRITE BUSINESS PROCESS ANALYSIS

ATTENDANCE REGISTER

LOCATION:_____

DATE:_____

PARTICIPANTS:

Name	Job Title	Discipline	Affiliation