



Appendix 2.8

Documentation Workflows

Below are workflows organized by outpatient, inpatient, and emergency department settings.

Outpatient

Disability status can change over time. In the outpatient setting, patients should be asked about their disability status and accommodation needs annually or every six months. There are six options for when to collect this information from patients:

1. Registration
2. Scheduling
3. Electronic check-in
4. Clinic check-in
5. Rooming
6. Patient portal

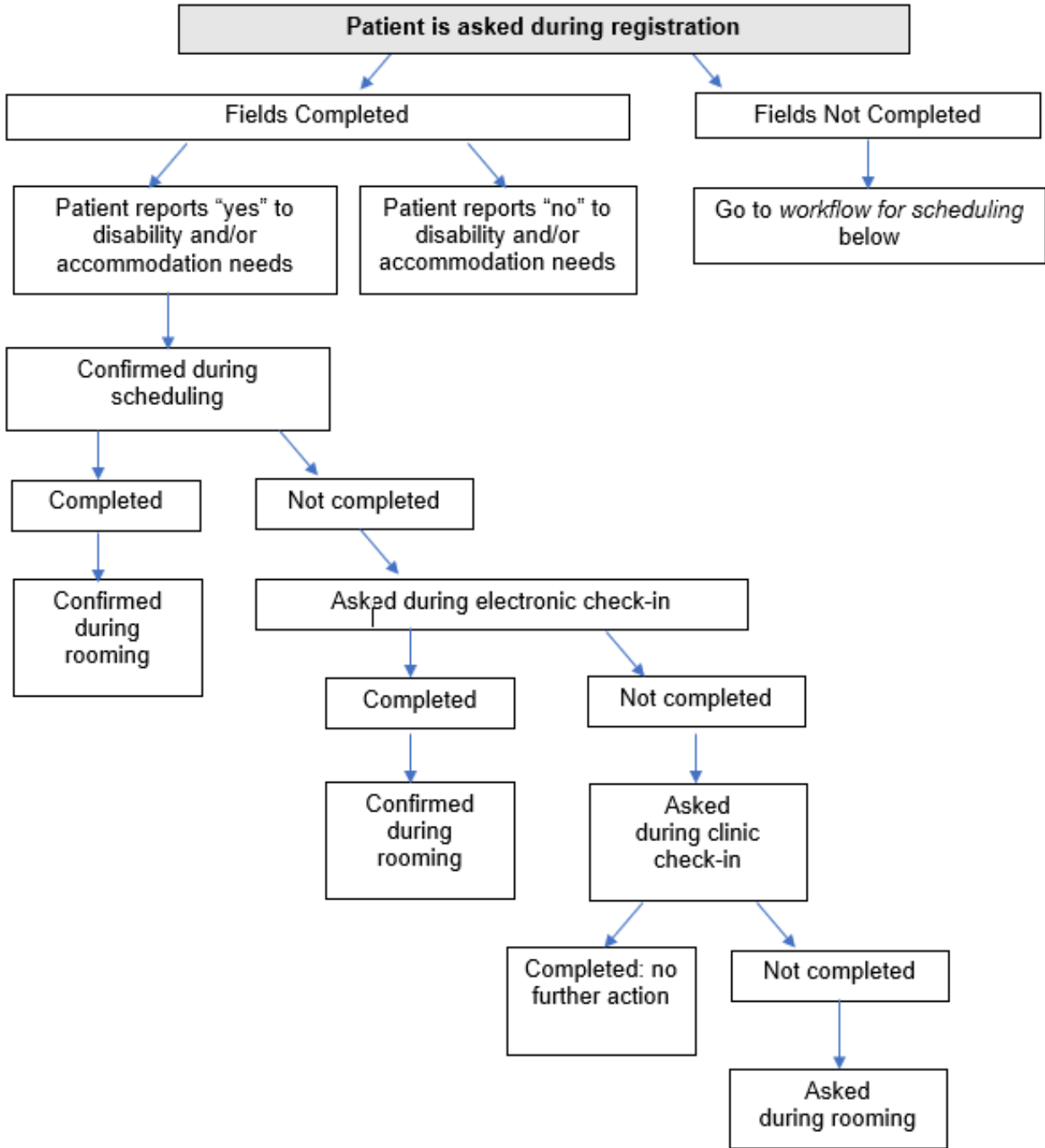
The diagrams below demonstrate the different workflows for different time points.

- If a patient reports a disability during registration or the patient portal, information should be confirmed during:
 1. Scheduling;
 2. Electronic check-in; or
 3. Clinic check-in.

If a patient reports a disability during check-in, information should be confirmed during rooming when the Medical Assistant ensures the patient has the accommodations they need.

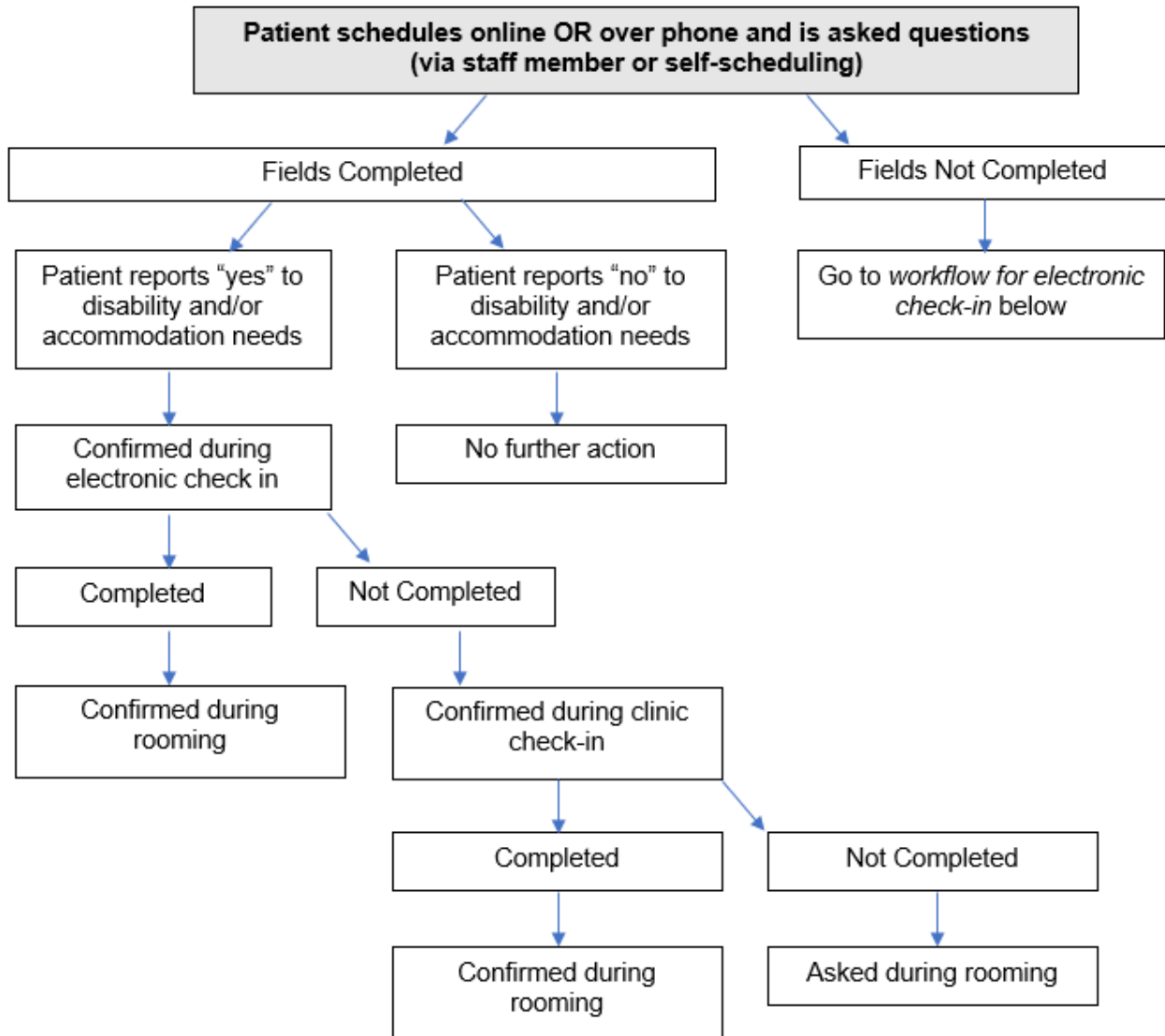
1.

REGISTRATION



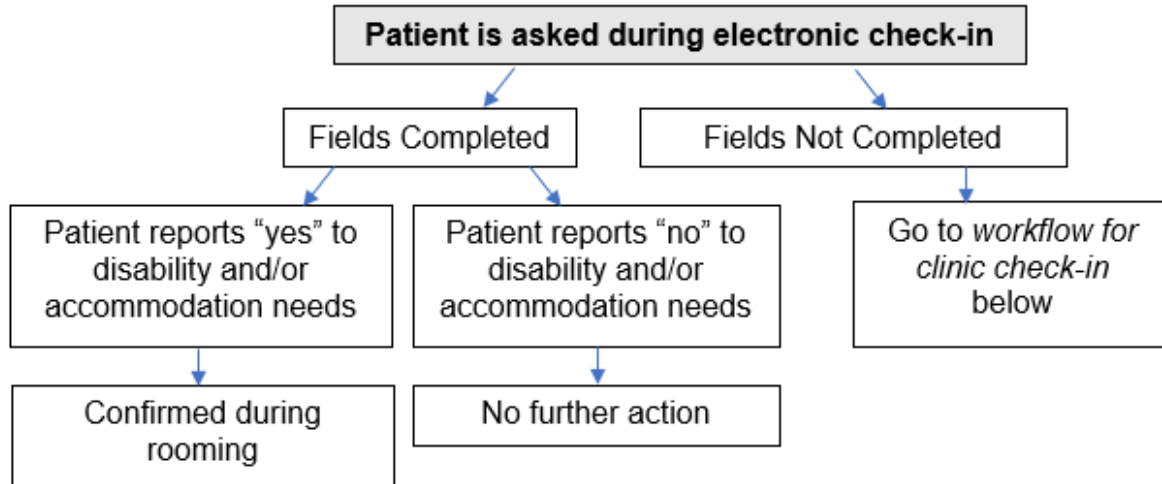
2.

SCHEDULING



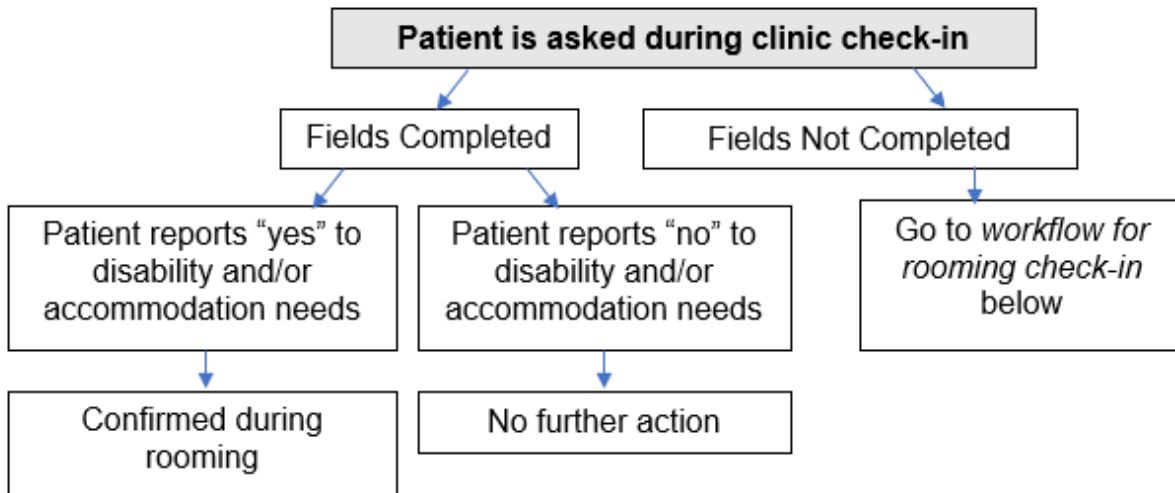
3.

ELECTRONIC CHECK-IN



4.

CLINIC CHECK-IN



5.

ROOMING

Patient is asked during rooming

These tables list all options for who, when, what, and how to collect a patient’s disability status and accommodation needs in the outpatient setting.

Pre-Appointment

WHO	WHEN	WHAT	HOW
Patient	Any time (at their leisure)	Invited to complete questionnaire	In patient portal
Patient	Scheduling appointment online	Asked disability status and accommodation questions	In patient portal
Patient	E-check-in	Asked disability status and accommodation questions	In patient portal
Scheduler	Scheduling appointment over phone	Asks disability status and accommodation questions	In EHR workflow
Registration staff	Registering patient over the phone	Asks disability status and accommodation questions	In EHR workflow

At Appointment

WHO	WHEN	WHAT	HOW
Front desk staff	In-person check-in	Asks disability status and accommodation questions and enters	In EHR workflow
Front desk staff	In-person check-in	Provides tablet/questionnaire to patient to complete pre-visit items including disability status and accommodation questions	Prompted in workflow
Medical assistant	Rooming	Asks disability status and accommodation questions and enters	In EHR workflow
Clinician	Encounter	Asks disability status and accommodation questions and enters	Ad hoc

After Appointment

WHO	WHEN	WHAT	HOW
Check-out staff	When scheduling next appointment at check-out	Asks disability status and accommodation questions and enters	In EHR workflow

Inpatient

You need to consider the pathway in which a patient is admitted and whether disability status was collected during admission. Disability status and accommodation needs should be asked during every admission. When selecting your process for documenting, consider whether a patient is admitted as an elective or planned admission, via the emergency department, or is transferred from another facility.

- **Patient is asked during patient registration**
 - Fields completed
 - Yes to disability and/or accommodation needs
 - Confirm during nurse intake
 - No to disability and/or accommodation needs
 - No further action
 - Fields not completed – *(go to workflow for nurse intake)*
- **Patient is asked during nurse intake process**

This table lists all options for who, when, what, and how to collect a patient’s disability status and accommodation needs in the inpatient setting.

WHO	WHEN	WHAT	HOW
Registration	Registration	Asks disability status and accommodation questions and enters	In workflow
Intake nurse	During intake process	Asks disability status and accommodation questions and enters	In workflow
Bedside nurse	During any interaction	Asks disability status and accommodation questions and enters	Ad hoc
Clinician	During any interaction	Asks disability status and accommodation questions and enters	Ad hoc

Emergency Department

- **Patient is asked during registration**
 - Fields completed
 - Yes to disability and/or accommodation needs
 - Confirm during triage
 - No to disability and/or accommodation needs
 - No further action
 - Fields not completed – (*go to workflow for triage*)
- **Ask during nurse triage**

This table lists all options for who, when, what, and how to collect a patient’s disability status and accommodation needs in the emergency department.

WHO	WHEN	WHAT	HOW
Registration	Registration	Asks disability status and accommodation questions and enters	In workflow
Triage	During triage	Asks disability status and accommodation questions and enters	In workflow
Bedside nurse	During any interaction	Asks disability status and accommodation questions and enters	Ad hoc
Clinician	During any interaction	Asks disability status and accommodation questions and enters	Ad hoc