



Correspondence Management and Workflow Optimisation The **CorrespondencePlus™** Program

Liberate up to 45 minutes additional consultation time per GP, per day.

Features of the **CorrespondencePlus™** Program:

- One of the most effective of the 10 High Impact Actions of the GP Forward View to free more time for Care
- Face to Face training at your Practice or choice of local Venue
- Highly practical half-day workshop delivers everything needed to implement the Program – skills, knowledge, documentation, process maps and audit protocols
- The Program is customised to the specific needs of your Practice or Locality.

What is Correspondence Management and Workflow Optimisation?

Typically in a GP Practice, the GP sees the vast majority of clinical correspondence that enters the Practice, and then sends it back out to the most appropriate member of the Practice team for further action as required.

Much of this correspondence (up to 80%) does not need to be seen by the GP and can be more effectively and safely dealt with by another member of the Practice team, saving up to 45 minutes of a GP's consultation time every day.

Workflow Optimisation is an integral part of correspondence management. It looks at the process by which the correspondence enters the Practice, the route it takes through the Practice and identifies the individual steps. It then addresses any bottlenecks, double handling, duplication and other inefficiencies, and helps the Administration team to optimise each step of the process in order to improve efficiency and reduce wasted time.



Who should attend the CorrespondencePlus™ Program?

CorrespondencePlus™ is a half day Course for the full Practice Team involved in managing correspondence (GPs, Practice Manager and Administration team). The Program's objective is to provide delegates with the practical skills, knowledge, supporting documents and process maps needed to fully introduce Correspondence Management and Workflow Optimisation protocols to the Practice within 5 – 7 weeks.

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We encourage GPs to attend with their Administration teams, as it is the GPs who are ultimately responsible for deciding which correspondence they need or wish to see. This fosters a sense of collaboration and teamwork which will ensure the introduction of the protocols progresses smoothly.

What are the key benefits of attending the Course?

When GPs are freed from dealing with inappropriate correspondence, there are major benefits to the whole Practice:

- **For GPs**, up to 45 minutes of additional consultation time are liberated per GP, each day
- **For Patients**, more efficient handling of clinical information in the Practice results in reduced waiting times and improved monitoring and management of certain conditions
- **For Administration staff**, greater involvement and influence over the way they do their work results in greater job satisfaction.



CorrespondencePlus™: "A highly practical and enjoyable workshop" – "Excellent...Just what we needed!"

The CorrespondencePlus™ Program

Our **CorrespondencePlus™** training is conducted through the medium of an enjoyable and engaging half-day, face to face Workshop, in which GPs, Practice Manager and the Administration team come together to focus on the practical aspects of managing their correspondence and workflow more efficiently.

The Workshop is followed by extensive consultancy and practical support to help the GP, PM and Administration team members introduce the program to the Practice as efficiently as possible.

The broad agenda of the Workshop includes:

- Introduction to the principles of correspondence management and efficient workflows
- Review of relevant legislation; Data Protection, Access to Health Records Act, IG, Caldicott, ICO etc.
- Introduction to the GP Forward View and the background to Correspondence Management
- Video case studies of Correspondence Management with input from GPs, Practice Managers and Administration team members
- Identifying the types and nature of correspondence entering the Practice
- Practical exercises in reviewing, managing and assigning typical document types
- Introduction to Incremental Improvement workflow system and practical workflow exercises
- The structured implementation process – 5-7 week process
- The Process Map – role, creation and management
- Auditing the new protocols
- Safety, Governance and Audit protocols
- Questions and Next Steps.

Workflow Optimisation – A Process of Incremental Improvement

There are many industrial strength workflow optimisation tools in the market, the vast majority of which are just too complex for use in a GP Surgery.

We have found that the Incremental Improvement technique used by Sir David Brailsford to transform the fortunes of British Cycling is highly applicable to a Practice environment and extremely effective.

This involves seeking an incremental improvement of 1% in every process step - it is easily understood and highly engaging. We have found that it also contributes to an ongoing and shared culture of continuous improvement throughout the Practice, long after the new protocols have been introduced.



Incremental Improvement transformed the British Cycling team's performance, resulting in multiple Olympic gold medals.

A Typical Staged Implementation of the CorrespondencePlus™ Program

STAGE 1 – TWO WEEKS

Over a two-week period, the GPs use a checklist that we provide to decide which correspondence, of that they currently receive, can safely and more efficiently be dealt with by another member of the Practice team. Tally sheets are collected daily by the Admin team and aggregated to reflect the views of every GP in the Practice.

At the end of the two-week period, the Practice Team comes together again and the Admin team present the collated findings of the GP document audits. Where there is agreement amongst GPs on a particular document type, this can be redirected from that point forward and the new protocol for that document type is entered onto the Process map. This is the master document, approved by the GPs and used by the Admin team, that lists each correspondence type and the protocol for its journey through the Practice..

If there is consensus but not full agreement, GPs may wish to assign restrictive criteria or caveats to certain of the correspondence types. The types of correspondence and any associated criteria are entered onto the Process Map and then applied by the Admin team in managing that correspondence type

STAGE 2 – ONE WEEK

Following the meeting, the Admin team create the master process map, incorporating the new document protocols agreed during the meeting. This process is overseen by the PM and Lead GP to ensure it reflects decisions made.

STAGE 3 – TWO WEEKS

Once the Process Map is complete the Admin team start to redirect correspondence away from the GPs in accordance with the agreed Process Map, resulting in a reduction of around 80% of the correspondence being seen by the GPs.

At the end of the two-week period the GPs can, if they wish, conduct another audit of their now reduced correspondence flow to see if even greater reductions in correspondence can be achieved.

STAGE 4 – ONGOING AUDIT

At weekly intervals for the first month, and monthly thereafter, the GP, Practice Manager and Admin team conduct an audit of a number of items of correspondence to track the item's route through the Practice. This ensures that the new protocols are working effectively and safely, and provides peace of mind to the GPs and Practice staff alike.

STAGE 1

- Initial analysis of Correspondence
- GPs assess which correspondence type can safely and efficiently be handled by another member of Practice team.

STAGE 2

- Practice meeting to secure agreement/consensus of document types to be redirected
- GP applies caveats/criteria to certain correspondence types as necessary
- Process Map created by Admin team to incorporate changes.

STAGE 3

- Administration team redirect correspondence according to Process Map
- GPs conduct second iteration of assessment process if needed.

STAGE 4

- Weekly audits conducted of selected items of correspondence for first month
- Safety, governance and audit reviewed monthly going forward.

Safety, Governance and Audit

Whenever processes are changed in a healthcare environment there is the potential for unforeseen risks to arise. The **CorrespondencePlus™** Program has safety at its heart and we provide comprehensive guidance and documentation to ensure audit and governance procedures meet the guidance and principles of the MDU and CQC.



Ongoing Consultancy and Support

DNA Insight provides 12 months of ongoing, 24/7 telephone support and documentation to the Practice and to commissioners to help them embed the new Correspondence and Workflow protocols in the Practice and to support the team introducing the concept.

DNA Insight provides advice and training to GP Practices in Active Signposting, Correspondence Management and Workflow Optimisation, and Social Prescribing/Care Navigation, three of NHS England's Ten High Impact Actions, designed to transform General Practice as part of the GP Forward View strategy.

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