Making the Most of Team Meetings

By Julie Loomis, RN, JD

Like most busy physicians, you probably dread the monthly team meeting to take a closer look at office processes and systems. In a day filled with playing phone tag, wading through e-mails, dealing with unexpected patient situations, following up on tasks and documenting, where's the time to squeeze in another meeting? You may already meet daily for the patient-care focused "huddle", so why is another meeting important? About a third of malpractice claims list hidden flaws in processes and systems as contributing factors. Correcting flaws and filling in the gaps is not only protective, it's crucial to patient safety. Even when things seem to be going well, the "silo effect" can erode the health and function of the team. By focusing primarily on individual tasks (reception, registration, billing, triage, rooming patients, treatment, etc.), it's easy to lose perspective on the common goal and communication suffers. Although a team meeting will take time, if it is well planned, organized and adheres to an agenda, the return should be more streamlined processes, increased efficiency and optimized work flow. Gathering together regularly (typically monthly), the team is challenged to look for inefficiencies and barriers to optimal service and are empowered to offer solutions. Additionally, there could be important updates to your EHR, practice management, email and other systems that require attention and discussion. Your EHR vendor and other commercial software providers are frequently adding time-saving features to their products that can be demonstrated at the meeting.

There are some basic tips for a successful meeting. The key is fast feedback in a structured yet open atmosphere. Start with a prioritized agenda that is relevant and on task to keep your team members from becoming frustrated by a myriad of topics. Physician facilitation is essential but don't make attendance mandatory for the entire team. Instead, ask for everyone's *participation* by sending out the agenda early, offering the opportunity to attend if s/he has identified a problem or may be involved in the solution. Take meeting minutes to summarize the discussion and concisely describe the action item(s) taken and who is responsible. Begin and end on time, even if that means giving some participants follow up assignments for the next meeting.

Rather than trying to cover too much ground, give the meeting a specific focus. Invite experts from within the practice to evaluate and make recommendations for time-saving tips. Just like using "macros" for efficiency in medical documentation, giving your IT specialist 5-10 minutes to teach the latest email shortcuts or EHR enhancements can save you significant time over the course of a day. Consider creating a task force to explore a new option, such as utilizing a scribe, to determine potential benefits and cost savings. Periodically address procedures for responding to unexpected events such as a provider or staff member who calls in sick, an office emergency, a fire drill, etc. so the event doesn't disrupt patient care.

Some practices implement a patient feedback tool, specifically to identify patient flow issues. Often, feedback can pinpoint a bottleneck in the system, preventing patients from receiving the highest level of service. For example, your practice may have a process or protocol intended for patient convenience (and practice efficiency) that ends up defeating that purpose. Do you allow patients to report to the lab for pre-physical or serial testing? If so, do you create an order for those tests on a specific date? Does your protocol cover the possibility that the patient needs to reschedule without the lab requesting new orders? Keeping track of patient callbacks related to processes is another opportunity to identify inefficiency. Do patients call back frequently for medication refills? For test results? These questions could point to the need for education on general practice policies that may be discussed at the team meeting.

Remember that regular meetings to review processes and work flow are well worth the time and effort as they can prevent a leading factor in medical malpractice claims: systems failure. Face-to-face meetings raise awareness of potential flaws and allow for centralized communication without relying on fragmented bits of information through emails or memos that can go unnoticed. For resources and more information on this topic, please see the resources section of our website.
