

Facilitator Guide: Optimizing Patient Flow and Data Integrity

I. Unit Overview & Preparation

Course Purpose: This unit is designed to close a specific performance gap among front-desk clinic staff by standardizing patient check-in procedures. By implementing these standardized practices, the instruction aims to eliminate critical data entry errors and significantly reduce waiting room bottlenecks.

Target Audience: This single-session workshop is built for newly hired healthcare administrators and front-desk clinic receptionists who are responsible for managing daily patient intake and operational flow.

Total Seat-Time: The instruction requires 90 minutes (1.5 hours) of live, face-to-face facilitated seat-time.

Classroom Setup: The instruction for this unit must take place in a dedicated healthcare classroom prepared with the following layout:

- **Facilitator Station:** Configure a primary facilitator station equipped with a projector and screen to allow for clear visual demonstrations of the protocols and software.
- **Learner Stations:** Ensure the room provides computer stations and adequate desk space for learners to use laptops while accessing the simulated Electronic Health Record (EHR) training sandbox.
- **Activity Space:** Arrange flexible seating and ensure there is open floor area so learners can comfortably pair up and physically simulate front-desk interactions during the hands-on role-play exercises without overcrowding.

Materials Required: The facilitator must prepare the following materials prior to the start of the session:

- Printed Learner Packets
- Laminated 5-Step Protocol Job Aids
- Six unique Patient Persona Cards for the role-play activities
- Printed Performance Observation Rubrics
- Personal Action Plan reflection worksheets
- Pre-loaded "chaos" (broken process) and "ideal" (corrected process) instructional video files

Event 2: Presentation & Content Delivery

Estimated Time: 20 minutes

Primary Objective: Ensure learners comprehend the standardized 5-Step Check-In Protocol and can accurately identify its sequence to eliminate data errors and clinic bottlenecks.

Facilitation Steps:

- **Introduce the 5-Step Protocol:** Utilize the visual presentation slide deck to systematically walk the group through each phase of the core workflow:
 1. **Acknowledge**
 2. **Authenticate**
 3. **Audit**
 4. **Acquire**
 5. **Advance**

See Appendix A

The 5-Step Check-In Protocol

Standardizing Patient Flow and Data Integrity for Front-Desk Excellence

- **Emphasize EHR Verification Checkpoints:** While detailing the protocol, specifically highlight the critical Electronic Health Record (EHR) checkpoints for demographic and insurance verification. Clearly explain how catching these specific data points prevents costly downstream billing errors.
- **Teach Communication Strategies:** Transition to interpersonal skills by covering the standardized, scripted conflict de-escalation strategies. Detail how to professionally

manage frustrated patients and properly set accurate wait-time expectations during periods of high clinic volume.

Coaching & Delivery Notes for the Facilitator:

- **Active Job Aid Integration:** Do not treat the handout as a passive takeaway. You must *explicitly* direct learners to pick up and look at their laminated 5-Step Protocol Job Aids, instructing them to follow along on the physical card as each corresponding step is presented on the screen.
- **Maintain Real-World Relevance:** Do not present this content in a vacuum. Actively and frequently connect the specific phases of the protocol back to the real-world clinic bottleneck case study discussed during Event 1. This continuous linking ensures learners understand exactly how this new procedure directly solves the performance gaps they just analyzed.

Event 3: Demonstration

Estimated Time: 10 minutes

Primary Objective: Connect the theoretical 5-Step Check-In Protocol to its practical, real-time application within the Electronic Health Record (EHR) system, enabling learners to identify the correct navigation pathways.

Facilitation Steps:

- **Simulate the Scenario:** Project the simulated EHR training sandbox onto the main screen so the entire class has a clear view. Role-play a realistic, live clinic check-in scenario using one of the pre-scripted "Patient Persona" cards.
- **Model the Application:** Actively demonstrate the correct application of all 5 protocol steps in sequence. Show the exact system navigation required for accurate demographic and insurance data entry.
- **Showcase Professional Tone:** Demonstrate the appropriate, professional communication required for patient interactions, specifically utilizing the scripted de-escalation techniques.

Coaching & Delivery Notes for the Facilitator:

- **Narrate Your Transitions:** Do not perform the demonstration in silence. You must *explicitly* announce each of the 5 steps as you transition between them (e.g., "I am now moving from Authenticate to Audit") so learners can accurately follow along on their printed Job Aids.
- **Emphasize De-escalation Nuances:** When demonstrating the de-escalation scripts, place heavy emphasis on modeling a calm, measured vocal tone and deliberate pacing. Explicitly pause to explain to the learners *why* that specific tone is effective in preventing further patient frustration.

- **Check Visual Accessibility:** Ensure the EHR sandbox projection is scaled appropriately so that all learners in the room, even those in the back, can clearly see the specific cursor movements, buttons, and navigation pathways being utilized.

Event 4: Hands-On Practice Activity

Estimated Time: 30 minutes

Primary Objective: Ensure learners can actively apply the 5-Step Check-In Protocol and scripted de-escalation strategies within the live Electronic Health Record (EHR) sandbox to successfully process complex patient intakes.

Facilitation Steps:

- **Pair Learners & Assign Roles:** Divide the class into pairs, assigning one participant the role of the front-desk administrator and the other the role of the patient. Distribute the randomized "Patient Persona Cards" that feature complex scenario injects, such as mismatched insurance data or a highly frustrated demeanor.
- **Initiate the Simulation:** Prompt the acting administrator to process the patient by executing the 5 steps while accurately navigating the EHR software and utilizing the appropriate communication scripts.
- **Mandate Role Swapping:** Once the first round is complete, direct the pairs to swap roles. It is critical that each learner receives direct, hands-on practice with both the technical software navigation and the interpersonal communication strategies.

Coaching & Delivery Notes for the Facilitator:

- **Strict Time Management:** You must use a strict timer to keep the role-play rounds on schedule. Do not let one scenario drag on; ensure both learners in the pair have an equal opportunity to practice as the administrator within the allotted time.
- **Proactive Room Roaming:** Do not observe this activity from the front of the room. Actively roam the floor to listen closely to the learners' vocal tones during de-escalation and physically monitor their EHR screen navigation in real-time.
- **Manage the Technical Environment:** Ensure the EHR training sandbox is properly reset between rounds, or verify that learners are using distinct patient profiles, so the second learner does not simply repeat the exact same scenario with the exact same data.

Event 5: Assessments and Feedback

Estimated Time: 10 minutes

Primary Objective: Utilize a standardized observation rubric to evaluate peer performance and deliver actionable, constructive feedback to improve the execution of the 5-Step Check-In Protocol.

Facilitation Steps:

- **Conduct the Evaluation:** Have the observing peer partner and the roaming facilitator score the acting administrator using the standardized 10-point Performance Observation Rubric.
- **Facilitate the Debrief:** Guide the observers to deliver immediate, constructive, and corrective feedback to their partners directly following each role-play round.

Coaching & Delivery Notes for the Facilitator:

- **Enforce Objective Feedback:** Actively monitor the peer feedback exchanges to ensure comments remain strictly tied to the observable behaviors outlined on the rubric, and actively redirect any subjective or overly critical personal opinions. Instruct the observers to focus their feedback on specific actionable takeaways, such as missed EHR system clicks or exact phrasing adjustments for de-escalation, rather than simply handing over a numerical score.
- **Ensure Psychological Safety:** It is critical to maintain a psychologically safe environment; you must be prepared to step in and mediate if a feedback session becomes unproductive or if a learner becomes defensive.

Event 6: Unit Summary & Debrief

Estimated Time: 10 minutes

Primary Objective: Synthesize the feedback and experiences gathered from the practical simulations into a concrete, personalized strategy for integrating the 5-Step Check-In Protocol into daily clinical workflows.

Facilitation Steps:

- **Reconvene & Review:** Bring the group back together to briefly review the unit's core performance objectives, ensuring everyone understands the ultimate goal of the training.
- **Analyze Friction Points:** Lead a guided, collaborative discussion focusing on the common friction points, challenges, and successes learners experienced during the hands-on simulations.
- **Independent Reflection:** Transition the class from the group discussion into a quiet, independent reflection period.
- **Action Plan Completion:** Direct learners to complete their **Personal Action Plan** worksheets, prompting them to document specific, actionable steps for utilizing the protocol and job aids during their upcoming live shifts.

Coaching & Delivery Notes for the Facilitator:

- **Foster a Blame-Free Environment:** Intentionally cultivate a safe space during the group debrief. Actively encourage learners to share where they struggled, made errors, or felt

flustered during the simulation so the group can collectively problem-solve without fear of judgment.

- **Strictly Manage the Clock:** Keep a close eye on the time during the group discussion. You must ensure the session does not run long so that the independent reflection is not rushed; the completion of the Personal Action Plan is critical for the actual transfer of learning to the workplace.
- **Provide Guiding Questions:** Be prepared to prompt learners who may be struggling to translate theoretical concepts into concrete actions. Ask guiding questions such as, *"Where will you physically place your laminated job aid at your workstation?"* or *"How will you remind yourself to pause before responding to a frustrated patient?"*