# [Organization]

# Nursing Scheduling Assessment
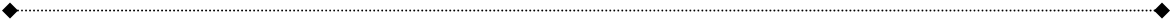
**Prepared by:**

**Version Control**

| Version | Date | Author | Change description |
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# 1 Nursing Management Analysis

## 1.1 Nursing Role Delineation

[Identify the responsibilities of each staff member.]

| Roles \ Responsibilities | [Perform patient check-in (validate insurance info; attain patient info)] | [Capture patient vital statistics (Height, weight, blood pressure, etc.)] | [Perform patient examination (determine patient's condition)] | [Diagnose patient's condition (evaluate patient's condition)] | [Record patient examination results (log patient info on flowsheet)] | [Define report requirements (determine what reports are needed)] | [Create patient examination reports (graph patient data; trend reporting)] | [Perform patient check-out (receive payment; assign follow-up appt.)] | [Store patient data (file, secure, back up patient data)] |
|---|---|---|---|---|---|---|---|---|---|
| [Administrator] | ● | | | | | | | ● | ● |
| [Medical Assistant] | | | | | ● | | ● | | |
| [Nurse] | | ● | | | | | ● | | |
| [Physician] | | | ● | ● | ● | ● | | | |
| *Resources* | | | | | | | | | |
| [Computer] | ● | | | | ● | | ● | ● | ● |
| [Exam Room] | | | ● | ● | | | | | |
| [Vital Assessment Room] | | ● | | | | | ● | | |
| [Exam Equipment] | | ● | ● | ● | ● | | | | |
| [Flowsheet] | ● | ● | ● | ● | ● | | | ● | ● |

### 1.1.1 Nurse Contact Information

[Identify nurse contact information (such as name, specialty, and e-mail).]

| Name | E-mail | Phone | Specialty | Clinical team |
|------|--------|-------|-----------|---------------|
|      |        |       |           |               |
|      |        |       |           |               |

## 1.2 Communication Plan

[Identify how patient data reports are communicated to pertinent staff members. Also, identify the frequency with which patient data should be received.]

| Date (action taken) | Delivery method | Sender | Receiver | Deliverable | Frequency |
|---------------------|-----------------|--------|----------|-------------|-----------|
| [Notify staff of patient arrival] | [Verbal] | [Administrator] | [All] | [Verbal Notification] | [Once] |
| [Communicate patient vital statistics] | [Written] | [Nurse] | [Physician] | [Flowsheet] | [Once] |
| [Communicate patient examination data] | [Written] | [Physician] | [Medical Asst.] | [Flowsheet] | [Once] |
| [Communicate examination data report requirements] | [Verbal] | [Physician] | [Medical Asst.] | [Verbal Notification] | [Once] |
| [Report patient examination data] | [Written] | [Medical Asst.] | [Physician] | [Report] | [Once] |
| [Store patient examination data] | [Written/ Electronic] | [Medical Asst.] | [Administrator] | [Flowsheet/Electronic File] | [Upon exam completion] |

## 1.3  Nursing Management Processes

### 1.3.1  Schedule management
[Identify timing considerations for scheduling nursing assignments. Include policies and processes that your organization uses to determine availability, skill-level compatibility, and other aspects that affect scheduling of nursing resources.]



Nursing scheduling spreadsheet

### 1.3.1.1 Employee Availability Restrictions
[Identify each item that affects scheduling of nursing resources.]

- Vacation/PTO request & approval process:

- Sick employee backfill process:

- Office holidays:

- Individual employee "regular" schedules:

- Schedule posting:

- Standard patient scheduling process and clinical workflow:

- Timekeeping:

- Clinic days/times:

- On-call service requirements:

- Office holidays:

- Required nurse training:

- Required nurse and/or staff meetings:

### 1.3.2  Resource management

[Identify the resources required by nursing staff members to perform their daily activities. Resources may include items such as equipment, rooms, and forms.]

| Task # | Task name | Resource name | Dependency | Comments |
|--------|-----------|---------------|------------|----------|
|        |           |               |            |          |
|        |           |               |            |          |

# 2  Scheduling System Analysis

## 2.1  Scheduling Tool Analysis

### 2.1.1  Architectural scheme

[Provide a graphical depiction of the system components and how they logically interact across the system. Describe the function of each component.]

### 2.1.2  Ease of use

[Describe procedures and processes that the user is required to follow, and provide a summary of user feedback. Feedback should be in the form of surveys distributed to users to obtain their opinions about the ease of using the system.]

### 2.1.3  Data storage

[Give the location for document storage for files associated with the scheduling system solution.]

### 2.1.4  Computer/software accessibility

[Identify the accessibility of computers and scheduling software for the nursing staff. Also, identify the members of the nursing staff who require computer/software access.]

## 2.2  Competitive Overview

[Provide a competitive analysis of major scheduling systems. If the system used by your organization is not among the major scheduling systems, illustrate where your system fits within the industry.]

# 3 Areas for Improvement

## 3.1 Critical Problem Analysis

[List all critical problems that have been identified with the scheduling system. Solicit input for this section from each staff member.]

| ID # | Description | Assigned to | Due date | Status | Comments |
|---|---|---|---|---|---|
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## 3.2 Best Practice Analysis

[List best practices in the industry for scheduling procedures. Include the file path or a link to the location of detailed information. Ensure that all information sources are listed.]

| ID # | Description | Location |
|---|---|---|
|  |  |  |
|  |  |  |

## 3.3 Recommendations

[List recommendations to improve the current scheduling system. Recommendations should be generated by end users and information systems support personnel in your organization.]

| ID # | Description | Recommended by | Result |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |

# 4 Sections Omitted

[List the section headings of any sections that you've intentionally omitted.]