

Project Scope: Medical Assistant Workflow Optimization

1. Project Objective

The objective of this project was to optimize the medical assistant (MA) workflow to improve efficiency, reduce patient rooming times, and enhance overall clinic operations. The goal was to decrease time spent on annual wellness visits and standard follow-ups while maintaining high-quality patient care.

2. Deliverables

- Reduced patient rooming times:
 - **Annual wellness visits:** Reduced from **20 minutes to 10 minutes**
 - **Standard follow-up appointments:** Reduced from **10 minutes to 5 minutes**
- Standardized workflow process for MAs across the clinic
- Improved provider scheduling efficiency
- Clear documentation of workflow improvements to facilitate training and implementation

3. Stakeholders

- **Providers:** Benefitted from a faster, smoother schedule with reduced wait times.
- **Medical Assistants (MAs):** Adopted a standardized, optimized workflow for patient rooming.
- **Clinic Manager:** Gained a better understanding of MA processes, allowing them to communicate average rooming times and efficiency improvements to the company.
- **Patients:** Experienced shorter wait times and a streamlined appointment process.

4. Timeline

The project followed a **Kanban-style approach** and was continuously refined over **six months** before reaching a stable, optimized workflow.

5. Constraints & Challenges

- **Diverse MA Workflows:** Medical assistants had different habits and processes based on their backgrounds, requiring training and standardization efforts.
- **Provider Engagement:** Some providers were unresponsive when asked for input on preferred workflow improvements, making it challenging to align expectations.
- **Change Management:** Resistance to change from some staff members required additional coaching and demonstrations of efficiency gains.