
Clinic Walk Through and Observation Exercise

Before starting an improvement journey, it is important to gather information and feedback, so teams clearly understand what a patient experiences during a typical visit to the clinic. With this information, teams can gain new insights and identify where processes can change to improve access, continuity, and efficiency of the clinic.

Tips for making the ‘Walk Through’ most productive:

- As an Improvement Team, determine where the starting point and ending point of the walk through should be, taking into consideration making the appointment, the actual office visit process, follow-up and other processes.
- Invite someone to your clinic to pretend to be one of your clinic’s patients. It is helpful to have someone with fresh eyes as they may notice things that others from your internal team may not. Consider your Practice Facilitator, patient partner or a team member from another clinic.
- Let clinic staff know in advance that a clinic walk through is taking place but also let them know they should not treat this visit any differently than a normal patient appointment.
- Have your observer:
 - Put themselves in the patient’s or family member’s shoes and go through the appointment experience just as the patient and family would.
 - Note both **positive** experiences and **opportunities for improvement** as well as any surprises you encounter. What was frustrating? What was gratifying? What was confusing? Take notes on the “Clinic Walk-through and Observation Checklist” attached.
 - Go through all the elements of a normal patient visit including calling for an appointment, parking, going through the registration process, etc.
 - Take note of things like signage, wait times, ease of parking, etc.
 - Proceed step-by-step through the appointment to the patient room and then back to check-out. Note any waits, total time, steps or other findings along the way.
 - Debrief with the Improvement Team on your observations.
- Start with one observation and see what insights the team gains. In some cases, it may be helpful to have this completed a few times to get feedback from different perspectives.

Clinic Walkthrough and Observation Checklist

CLINIC: _____ PROCESS OBSERVED: _____

OBSERVER: _____ DATE: _____

Activity	Positives Experiences	Opportunities for Improvement
Making an appointment -phone -secure messaging -website -appointment reminder		
Parking & public transportation		
Access to Clinic -steps -stairs -elevator -clinic sign -clinic door		

Activity	Positives Experiences	Opportunities for Improvement
Reception Area: -Appearance -Lighting -Space -Signs -Privacy -Sanitizer available		
Check-In: -Privacy -Physician on time -Easy check-in process -Any delays?(E.g. waiting for exam room)		
Exam Rooms: -Chart ready -Looks clean -Supplies stocked -Feels safe -Sanitizer available		
Follow-up: -Scheduling of future appointments, tests or procedures		

<p>Other observations</p>		
<p>Did interruptions take place during appointment? If so, why?</p>		
<p>How long was the wait between appointment steps?</p>		
<p>How was the flow of the appointment regarding all necessary steps?</p>		

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