Writing Playbooks

That Are *Awesome*

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What's a playbook?

Toss Sweep I-Form

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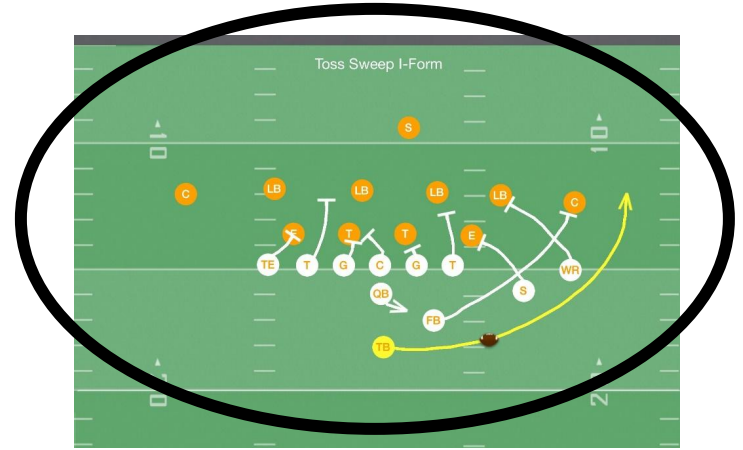
Why do you need a playbook?

- Staffing crisis
  - Lots of new hires
  - Relative scarcity of trainers
  - Need for cross-training and upskilling

- People want to do the right thing
  - Staff want to meet your expectations
  - You want to meet staff expectations

- Tighter margins in medicine
  - Less time for training
  - Higher stakes for errors

- Consistent delivery
  - Reduces error and waste
  - Provides a competency testing rubric

You may need a playbook when…

- You get wildly different outcomes for a single process.
- You think, "She's been here [duration] and she STILL can't do [task]?"
- Asking Wanda why she scheduled that appointment in that slot results in tears.

Write down 2-3 key needs your practice has for a process guide. Be specific.

Tips for Getting Started

- Prioritize your joy stealers
  - High frequency, high error rate?
  - Low frequency, low margin?
- Write for the team member who needs the playbook
  - Unfamiliar with the what and why
  - Lower aptitude for reading
  - Less focused
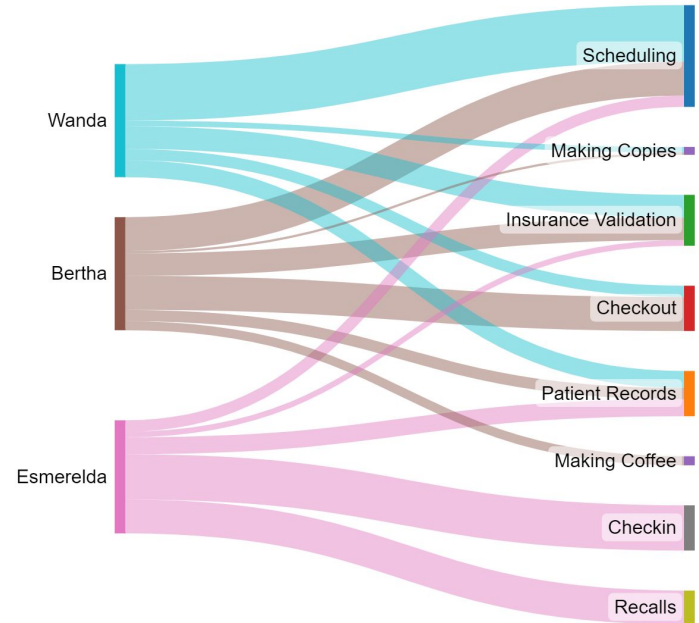
Pick one of your playbook needs to start writing.

Policies vs Procedures

Topic	Policy (What and Why)	Procedure (How-To)
Tardiness	"All staff should be at their assigned work stations at their assigned start times."	"Notify your manager by phone or text message if you anticipate > 5 minutes tardiness."
In-Office Emergencies	"No fewer than two staff members, including at least one clinical staff member, should be in the office any time patients are present."	"If you find an unresponsive patient, first…"
Paycheck Advances	"[Practice] will decline any request for paycheck advances."	n/a
PTO	"In their first year, employees receive 10 days of PTO; in years 2-5…"	"To request time off, complete [form] and turn it in to the Practice Administrator no fewer than 30 days before…"

Do you need to write a policy or a procedure?

Start brain dumping your process

Divide the process you've identified into its major chunks

Write the first few steps

Use _____ or [blah] for needed placeholders

Writing tips: The shorter, the better

- Use short words & sentences
  - Define abbreviations/acronyms on first use
  - No cruft words
- Be specific and concrete
  - Avoid fluffy vagaries
  - Examples illustrate
- Explanations/justification belong in policies, not procedures

How can you tighten up your draft play?

> *It is the policy of Podunk Pediatrics that patient information be entered accurately for efficient provider workflow and to ensure a smooth patient experience. The administrative staff carefully reviews the collected forms and documents to ensure that all necessary information is complete and accurate. Any missing or incomplete information is identified and promptly addressed by contacting the patient or the referring healthcare provider for clarification or additional details. Once all the required information is obtained and verified, the administrative staff will then proceed to input the data into the electronic health record (EHR) system. This data entry process involves meticulously transferring the information from the collected forms and documents into the designated sections of the patient chart, ensuring that each piece of information is accurately recorded.*

Writing tips: Use active voice

|	
The decision to create a new patient chart is made by the administrative staff upon receiving the patient's demographic and medical information based on whether the patient is new or established. The necessary form required for the creation of the new patient chart is completed by the patient.	*Next, the centrifuge should be turned on. After waiting 5 minutes, the centrifuge should be turned off and the tube should be removed.*
Patients who do not already have a chart in PCC EMR should complete a Podunk Pediatrics New Patient Form.	*Next, turn on the centrifuge. Wait 5 minutes, then turn off the centrifuge and remove the tube.*

Are you using active voice in your playbook?

Elements to break up "word walls"

- Use lists, numbered steps, and bullet points

- Use illustrations and images
  - Frame the subject like a photo
  - Arrows/boxes/highlights help focus

- Use whitespace

- Videos can be extremely effective when used sparingly
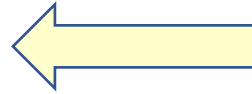
Use quality screen shot software like Snagit or Droplr

What assets do you want to add to your play?

Google and/or ChatGPT

2. *Schedule Notification and Changes:*
   a. *Any anticipated absence, tardiness, or change in the regular schedule must be communicated to the immediate supervisor or designated person as soon as possible, preferably at least [X] hours in advance.*
   b. *Employees should follow the established procedure for requesting time off or schedule modifications, including using the appropriate forms or electronic systems, if applicable.*
   c. *In case of unforeseen circumstances or emergencies, employees must notify their supervisor or the designated person as soon as possible.*

15. *Process the blood sample.*
    a. *Follow the lead testing kit instructions to process the blood sample appropriately. This may involve transferring the blood from the collection strip or capillary tube into a designated container or onto a testing platform.*
    b. *Ensure that all necessary information, such as the child's identification, is correctly recorded on the testing materials.*

16. *Dispose of materials and clean up.*
    a. *Safely dispose of used lancets, collection tubes, and other sharps in an appropriate sharps container.*
    b. *Discard any used materials, such as gloves, gauze pads, and alcohol swabs, into biohazard waste containers.*
    c. *Clean the area where the procedure was performed, following proper infection control protocols.*

Dopamine hits

- With key steps, provide a confirmatory message with the expected response (or guidance for unexpected responses.)

Plain	With Dopamine
Click the **Create new note** button.	Click the **Create new note** button. A box will pop up.
Insert the spinal needle with the bevel up. Advance the needle slowly. Remove the stylet to check for CSF flash.	Insert the spinal needle with the bevel up. Advance the needle slowly. If you feel hard resistance, partially withdraw and reangle the needle. If you feel resistance that suddenly gives way, you have penetrated the dura. Remove the stylet to check for CSF flash.

What dopamine-raising statements can you add?

The source of truth: Include references

- Provide original language if needed for clarification
- Provide source for regulatory/legal requirements
- Rule of law, rule of science

- HCP with <u>mild to moderate illness</u> who are *not* <u>moderately to severely immunocompromised</u>:
  - Since symptoms first appeared:
  - 5 days have passed and a negative NAAT test is performed on day 3 of symptoms, OR
  - 5 days have passed and negative antigen tests are performed on day 3 of symptoms and day 5 of symptoms, OR
  - At least 24 hours have passed since last fever without the use of fever-reducing medications, AND
  - Symptoms (e.g., cough, shortness of breath) have improved.
- HCP with severe illness, or who are moderately to severely immunocompromised, will not be asked to return early.

The CDC's Interim Guidance for Managing Healthcare Personnel with SARS-CoV-2 Infection or Exposure to SARS-CoV-2 and Strategies to Mitigate Healthcare Personnel Staffing Shortages were used to develop this protocol.

What references should appear in your play?

Cleaning up

Content

- Spell check

- Grammar check

- Readability analysis (e.g. *readable.com*)

- Unified style
  - Staff names vs. titles
  - Technical references to menus and buttons

Format

- Unified fonts, font sizes, and colors

- Pagination

- Section headers and table of contents

- Last modified date and by whom

Playtesting the Playbook (aka Editing)

- Read it out loud

- Evaluation by someone unfamiliar with the process

- Evaluation by someone familiar with the process

- "Break the parser"
  - Find unintended gaps and unintended consequences
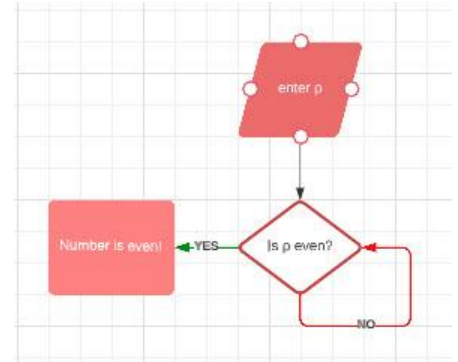
Share your draft play with a neighbor

Now that you've written it

- Make it accessible
  - Paper or digital?
  - Word, Google Doc, or PDF?
- Commit to periodic critical review

Where are you going to put it?

Version control

AAP's SOAPM

(Section on Administration and Practice Management)

Peer-to-peer networking and educational programs about running of your practice (HR, payment, EMRs, contracts, medicolegal, workflows)

- $30/year for clinicians who are AAP members

- $75/year for administrators/managers through Pediatric Practice Managers' Alliance (PPMA)

About SOAPM: www.aap.org/soapm

To join: https://membership.aap.org/Application/AddSectionCouncil