

Stop Charting at Night

Dr Sarah Smith,
Charting Coach.

Pan Northern Clinical Rounds
Northern Ontario School of Medicine



Dr Sarah Smith

- Rural Family Physician
- Rural Emergency Department & Inpatient Care
- Medical Preceptor
- The Charting Coach
- Founder of **Charting Champions Program** and **Smarter Charting Program**
- Mom, Wife, Adventurer

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Podcast: Sustainable Clinical Medicine



Disclosure Information

Dr Sarah Smith

Any Direct Relationships, including receipt of honorarium:

Southern California Kaiser Permanente – Speaker Honorarium
Northern Ontario School of Medicine – Speaker Honorarium
Money Fit MD – Speaker Honorarium
Money for Women Physicians – Speaker Honorarium
Weight Solutions for Physicians – Speaker Honorarium
You Are Not Broken – Speaker Honorarium
Anti-Fragile Female MD – Speaker Honorarium
Empowering Women Physicians – Speaker Honorarium
South Calgary Primary Care Network – Speaker Honorarium
Allina Health Rehabilitation Institute – Speaker Honorarium
Queens University Toronto - Coaching Fee
Mount Nittany Medical Centre – Speaker Honorarium
Kara Pepper Coaching – Speaker Honorarium
Ontario College of Family Physicians - Speaker Honorarium
Canadian Women in Medicine Conference - Speaker Honorarium
Victoria Division of Family Physicians – Speaker Honorarium
University of Chicago Rheumatology Grand Rounds – Speaker Honorarium

Membership on advisory boards or speakers' bureaus

Member Alberta College of Family Physicians – Member Advisory Council (Now inactive)
Member McLeod River Primary Care Primary Care Network – Physician Member (Active)
University of Alberta – Department of Community Engagement – Preceptor (Active)
Edson Medical Centre Board Member and Physician Owner (Active)
Alberta Medical Association – Consultant and Speaker Honorarium
Integrate Community Clerkship Education Advisory Committee (Now inactive member)

All other investments or relationships that could be seen by a reasonable, well-informed participant to influence the content of the educational activity

Reach Career Coaching Inc – Director/Owner of the Charting Champions Program

Names of Not for Profit and For Profit Organisations

Canadian College of Family Physicians, Family Medicine Forum – Sponsored Talk
Rocky Mountain Internal Medicine Conference – Sponsored Talk
University of Alberta, Fall Conference – Speaker Honorarium
MNP Accounting – Invited Speaker without Honorarium
Mosaic Primary Care Network – Speaker Honorarium
Kootenay Boundary Division of Family Practice – Speaker Honorarium
Schuswap Division of Family Practice – Speaker Honorarium
South Island Division of Family Practice – Speaker Honorarium
Nanaimo Division of Family Practice – Speaker Honorarium
Chilliwack Division of Family Practice – Speaker Honorarium
Authenticity, Courage and Empowerment Conference – Sponsored Talk
North York General Hospital Family Medicine Residents – Speaker Honorarium
OntarioMD Digital Health and Virtual Care Conference – Sponsored Talk
Mankato Clinic – Invited Speaker without Honorarium
Dartmouth Hitchcock Dermatology Department – Coaching Fee
Ohio Family Physicians – Speaker Honorarium
Physicians Mom's Group Conference – Sponsored Talk

Funded Grants, Research or clinical Trials – N/A

Patents for a drug or Device – N/A

Investments – N/A

I will not discuss off label use or investigational/unapproved use in my presentation.



Objectives:

1. Noticing our current workflow within our clinical day
2. Where to start: overview of the process to get done and get home as fast as possible
3. Ignite a spark that change within your clinical day is possible



Running Diagnostics

What is your
current experience
of the clinical day?

Taking Notice – Protected Patient Time:



1. How many patients per day (new and returning)
2. How long are the appointments Immediately after the encounter, how much of the chart note already exists
3. How long does it take to chart How do you complete the chart (typing, dictating, combination)
4. How far behind are you running

A woman with glasses and a yellow shirt is sitting at a desk, talking on a mobile phone. She is looking slightly away from the camera. In the background, there is a bookshelf filled with books and a potted plant.

Taking Notice – Everything Else

- Patient Portal/Messages
- Inbox for Lab Results
- Script Refills
- Staff Questions
- Meetings
- Forms
- Emails
- Learners
- Other Admin Roles



At the end of the day
and the charting and
inboxes aren't done

How are you feeling?



Where do I even Start

I'm never done

I'm always thinking
about work

Does it ever end

I'm So Overwhelmed

Will I ever figure this out

I just sit and look at it

What's wrong with me





The 4 Steps
to get you home
with today's work done



Step 1: Completing your charting
after every patient

Step 2: Lead your clinical encounters

Step 3: An exact plan for inboxes

Step 4: Manage your interruptions



Complete Your Charting after every
patient

Even When ...



How is it Possible? Evaluate

What is in your notes and Why

What is your brain telling you is more important than the note

How and where could you get the note done if you wanted to

What stops you



What Stops You?

For Every Obstacle
What is YOUR most simple solution?



Leading Your Clinical Encounters

Evaluating all the
Minutes and Seconds in
the Room

Making Decisions with
Now and Later in mind

Exact Plan for Inboxes, Worklists and Forms





Manage Your Interruptions

Interruptions contribute to our Decision Fatigue



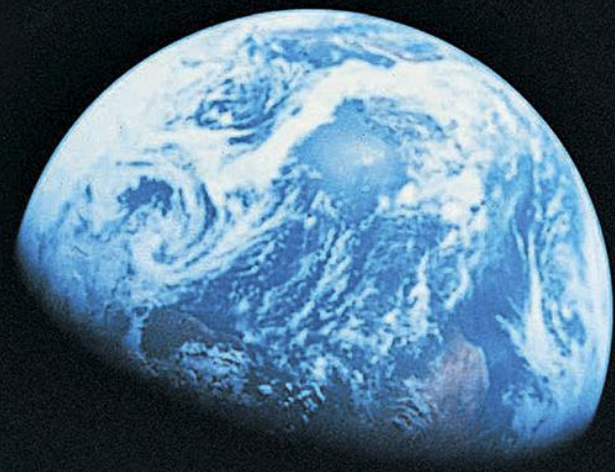
BUT

That's a lot
to change



**It's Possible to
Be having a
Different
Experience of
Clinical Medicine
Right Now.**

It may feel
Impossible





What is
Medicine
Costing You
Right Now?



Mental Load

Under-earning

Reduced time for Rest,
Family and Life outside of
Medicine

Unsustainable Clinical
Medicine



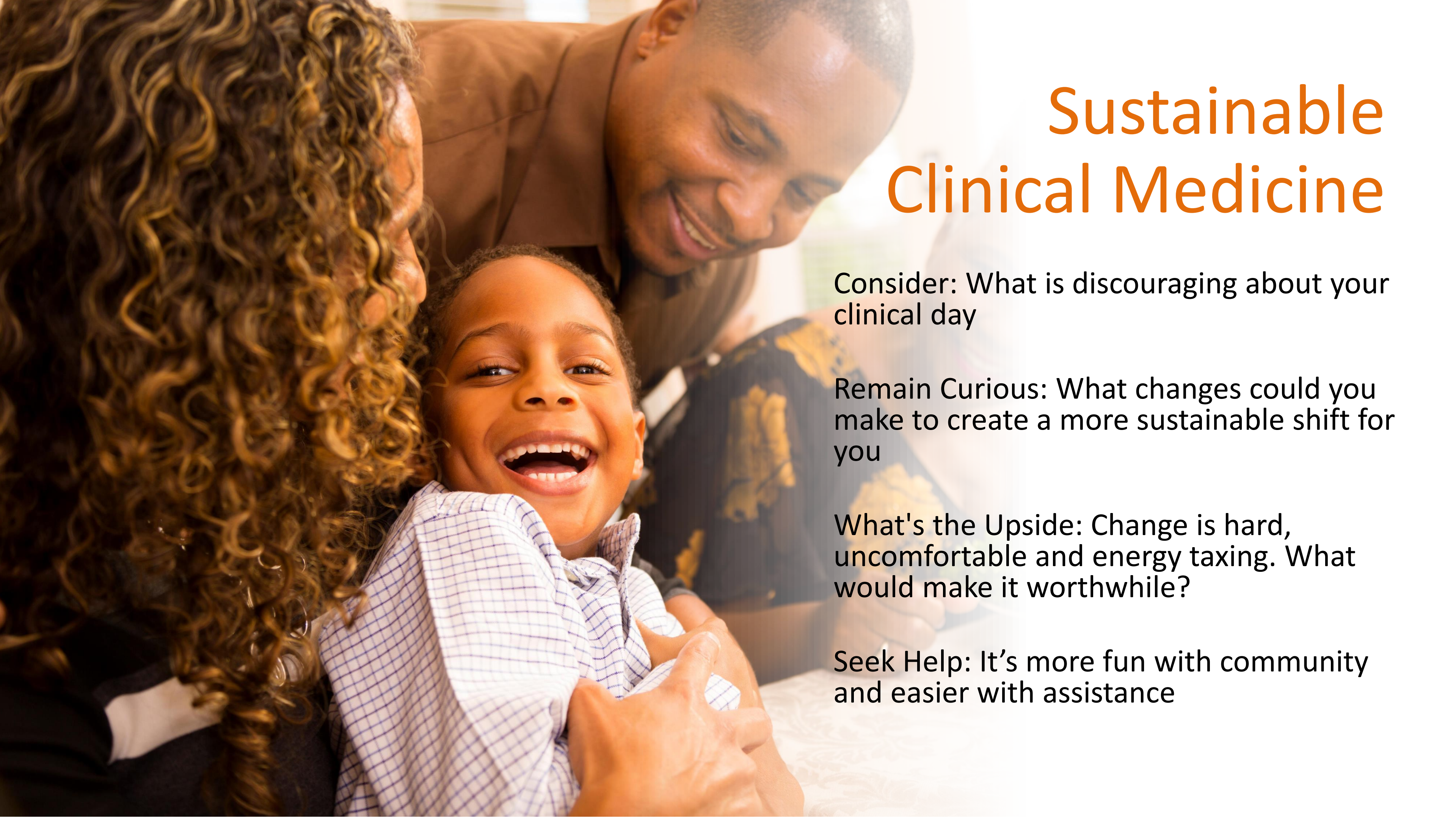
What would be different about your Clinical Day if you were seeing patient number eight for the day and all today's charts were closed?



A photograph of a person in a red jacket running and a cyclist on a gravel path in a hilly landscape. The person in the red jacket is running away from the camera, and the cyclist is also riding away from the camera. The background shows rolling hills and a winding road. The text is overlaid on the right side of the image.

What would
be different
about your
Evenings if
your charts
were closed?



A photograph of a family with curly hair, a man, and a young child smiling together. The child is in the foreground, wearing a blue and white checkered shirt. The background is slightly blurred, showing the parents and the child's hands.

Sustainable Clinical Medicine

Consider: What is discouraging about your clinical day

Remain Curious: What changes could you make to create a more sustainable shift for you

What's the Upside: Change is hard, uncomfortable and energy taxing. What would make it worthwhile?

Seek Help: It's more fun with community and easier with assistance



Canadian Resources:

Charting Champions Program &
Smarter Charting Program

CME, Tools, Support and
Community

www.chartingcoach.ca

Boundaries Training

<https://www.triumphleader.com/>

OntarioMD

<https://www.ontariomd.ca/>

10 minute CBT for Doctors

<http://cbt.ca/topics/ten-minute-cbt/>

“In Real Time” AI Scribing

<https://mutuohealth.com/>

Change is hard
But NOT
impossible

- Small steps
- Let it be messy

