



## 5 Tips for Adopting Automation in Your Healthcare Practice

*This is an extra resource to go along with the original article:*  
[Why your intake forms need an automated workflow](#)

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Beginning the automation process can be difficult. Thankfully, there are several best practices healthcare administrators can follow when adding automation to the workflow process.

### Tip 1: Get input from staff and other administrators

Feedback is an important part of the automation process. The first step is to talk with staff, practitioners and other healthcare administrators to find out where the biggest slowdowns in the clinic (in terms of paperwork or form management) are occurring. Your staff may have a better idea of which forms are causing the most headaches, while other administrators who have already added automation may give insight into the best solutions for the challenges you face.

### Tip 2: Provide proper training to anyone who handles forms

Automation should mitigate some of the burden on your staff, but bottlenecks can still happen if staff is not properly trained to use the automation tool or software. Proper training can also save time and help staff members and practitioners see the benefits of the program. Your goal should be to make sure even the least tech-savvy person in the room feels comfortable with the demands of a new digital workflow.

### Tip 3: Be open to changing any tool that doesn't work

While you should give any new automation tool or software (and staff) time to adjust to your workflow, be open and honest if an automation solution just isn't working for your practice. If possible, take a few days or even a week to see if things really have improved. If you're investing in automation, it should save you a noticeable amount of time and effort. Consider getting feedback from staff and practitioners (after training and adequate time) about whether or not they feel things have improved. If not, consider your alternatives.

### Tip 4: Understand any workflow you're trying to automate

If you're trying to automate an existing process without truly understanding what the process entails or how automation can help, you may not see any tangible benefit. It's important to take the time to properly map out your processes and evaluate, if necessary, where, why and how things could be improved through automation. This will also help you see whether or not a certain automation tool or software is right for the job.

# IntakeQ

## Tip 5: Work backwards from your ideal workflow

At the end of the day, your workflow should be able to [fill in the blank with your goal here]. It's important to set a clear vision of what the end state of the automation will look like. Should intake forms automatically go from website to EMR? Or should someone look at them first? If you understand the end results, you should be able to work backwards and create a workflow that actually works for you and your team.