



Cubiko Workflows



Metrics to look through on a daily, weekly and monthly basis. Use this workflow to clearly define the key metrics for your team to focus on, assign who is responsible for acting on the data, and establish a regular review frequency for each metric.

How to fill out the customisable workflow

Document which metrics members of your team should be monitoring on a daily, weekly or monthly basis.

With this template, you can create simple workflows for individual members of your team, highlighting which metrics they should regularly be focusing on.

Print and laminate the workflow as a visual prompt for team members to remember what metrics they should regularly be monitoring or actioning.

The PDF is self-fillable and printable. Simply insert text into the text field and save a copy to your desktop or folder of choice. If you're creating workflows for multiple team members, make sure to create a new copy to avoid saving over a pre-existing team member's workflow.

If you're unsure what metrics different team members should be monitoring or actioning, please refer to our [Role-based workflows](#) to see which metrics we recommend.

Daily Workflow

Cabinet	Metric
Today's clinic metrics	Possible service opportunities today <u>Action:</u> See a list of patients coming in for an appointment today who may be due for a Health Assessment, GPMP, 10997 or vaccines.
Today's clinic metrics	Recall appointments to rebook <u>Action:</u> See a list of patients who did not attend a recall appointment type and do not have a subsequent appointment booked. Contact these patients and book them in for an appointment.
Today's clinic metrics	Overdue reminders <u>Action:</u> Use this list to follow up on any overdue reminders.

Weekly Workflow

Cabinet	Metric
Item optimisation	Item eligibility (varied depending on which items your practice is focusing on) <u>Action:</u> Review patients eligible for items such as GPMPs, TCAs and Health Assessments.
Vaccination support: Covid-19 vaccine	Patient eligibility & upcoming appointments <u>Action:</u> See a list of all your upcoming vaccination appts over the next 4 weeks. Utilise this data to manage your stock & easily see how many appointments you have left avail for vaccine bookings.
Vaccination support: Flu vaccine	Patient eligibility & upcoming appointments <u>Action:</u> See a list of all your upcoming vaccination appts over the next 4 weeks. Utilise this data to manage your stock & easily see how many appointments you have left avail for vaccine bookings.

Monthly Workflow

Cabinet	Metric
Quality Improvement	Varied depending on what your practice is focusing on <u>Action:</u> Review areas in your practice that may need improvement and track how your progressing to meeting your practice goals.
QuickCheck	Verify patient eligibility <u>Action:</u> Use this metric daily to quickly and securely verify patient item eligibility.

Daily Workflow

Cabinet	Metric

Weekly Workflow

Cabinet	Metric

Monthly Workflow

Cabinet	Metric