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Is Your Women's Health EHR Working for You?

A Checklist for Modern Workflows, Safer Care, and Practice Success

Introduction

Elevating Women's Health with a Smarter EHR

As a women's health or family medicine clinician, your mission is to provide safe, compassionate, whole-person care to women, from adolescence through menopause and beyond. But running a practice involves more than delivering excellent clinical care. Inefficient workflows, manual documentation, and missed preventive care opportunities can quietly reduce revenue and increase stress for your team.

This workbook helps you identify inefficiencies, optimize workflows, and strengthen financial performance — all while keeping the focus on women's health across life stages. Use the checklists, self-assessments, and action steps to make practical improvements that save time, reduce errors, and enhance patient engagement.



1. Streamline Preventive & Reproductive Health Tracking

Why It Matters: High-quality women's health depends on timely screening, proactive reproductive care, and reliable follow-up across years of visits. From contraception management and fertility planning to cancer screenings and menopausal care, your EHR should make it easy to provide longitudinal care to women throughout her life.

Efficient workflows and care reminders help clinicians act promptly, avoid gaps in care, and keep patients informed and engaged in their own health.

See how Elation can help.

Checklist: Is Preventive & Reproductive Health Easy to Track?

- ☐ **Preventive health needs (Pap/HPV, breast imaging, STI screening, bone density, vaccines) are easy to review during the visit.**
- ☐ **Health maintenance and care-gap tools flag when cervical, breast, bone, and other preventive screenings are due based on age and risk, so they can be addressed during routine visits.**
- ☐ **LMP, menstrual history, and contraception method are clearly documented, easy to update, and visible at the point of care.**
- ☐ **Obstetric history, pregnancy intention, and reproductive life planning can be captured discretely in the chart using structured templates and made easy to reference during visits.**
- ☐ **Abnormal screening results (Pap, HPV, mammogram, DEXA, STI tests) route into the EHR's inbox and tasking workflows so follow-up and reminders can be handled reliably.**

Action Step: Choose one preventive domain — cervical cancer screening, breast cancer screening, or contraception management — to optimize this month. Standardize documentation, streamline how you review results, and configure reminders or care-gap tools where possible. Track the impact on time saved and follow-up rates.

2. Optimize Annual & Problem Visits for Women's Health

Why It Matters: Annual exams and problem-focused visits are the backbone of women's health. Thoughtful, AI-assisted templates and visit workflows can reduce documentation time, minimize errors, and ensure that preventive care, mental health, and reproductive goals are addressed consistently.

[Find out what it means to have an EHR designed around your clinical needs.]

Checklist: Are Your Visit Workflows Efficient?

- ☐ **Annual/well-woman visit templates are ready-to-use, customizable, and age- and life-stage–specific (adolescent, reproductive years, perimenopause, menopause).**
- ☐ **Patients complete intake forms, screeners (e.g., depression, anxiety, IPV, sexual health), and health history updates before visits, with discrete results flowing directly into the chart.**
- ☐ **AI-assisted documentation tools work seamlessly with your visit templates, capturing the conversation and generating comprehensive, structured notes without adding extra clicks.**
- ☐ **An actionable list of visit follow-ups, such as prescription renewals, referrals, or lab orders, is automatically generated to help you stay focused on the patient while still ensuring nothing falls through the cracks.**
- ☐ **Notification of results and reminders for chronic conditions can be automated within the EHR to support reliable follow-up.**

Action Step: Audit one high-volume visit type — for example, annual exams. Identify one area to simplify (templates, structured fields, or pre-visit forms) and implement a change. Measure impact on visit length, after-hours charting, or documentation completeness.

3. Strengthen Screening, Chronic Condition & Specialty Care Management

Why It Matters: Many patients rely on their women's health clinician to help manage chronic conditions and coordinate specialty care — particularly around pregnancy, menopause, and complex gynecologic needs. Your EHR should support integrated care that looks beyond a single visit to the patient's full clinical story.

[See how Elation supports Women's Health workflows.]

Checklist: Are Clinical Workflows Aligned with Whole-Person Care?

- ☐ **Cardiometabolic risk factors (blood pressure, lipids, weight, diabetes, smoking) are easy to track over time and addressed systematically during visits.**
- ☐ **Menopause and perimenopause care is supported with templates or protocols for symptom assessment, hormone and non-hormone therapy options, and follow-up.**
- ☐ **Seamless features allow you to quickly spot trends in core metrics such as weight, bmi, and blood pressure.**
- ☐ **Abnormal uterine bleeding, pelvic pain, endometriosis, and PCOS are managed with standardized workflows that can include embedded order sets, labs, imaging, and referral options.**
- ☐ **Oncology-related care (e.g., breast, ovarian, endometrial cancer risk) is supported with workflow prompts, structured documentation, and referral tracking.**
- ☐ **Screening for mental health, substance use, intimate partner violence, and social needs is integrated into workflows, with clear referral and follow-up processes.**

Action Step: Select one clinical area where missed follow-ups or variability in care are common (e.g., abnormal Pap follow-up, abnormal mammogram coordination, PCOS management). Map the current workflow, identify friction points, and configure a standardized pathway (templates, order sets, or referral workflows) in your EHR.

4. Boost Engagement with Women & Their Support Networks

Why It Matters: Women often serve as key decision-makers for their own health and for their families. Empowering them with clear information, digital access, and simple ways to connect with your team can improve adherence, satisfaction, and long-term relationships — without overwhelming staff.

Interested in what this could look like in your EHR?

Checklist: Is Patient Engagement Streamlined?

- ☐ **Patients can securely access their records, lab results, imaging reports, and visit summaries through an online portal or mobile app.**
- ☐ **Appointment scheduling — including annual visits, follow-ups, and telehealth — is easy to initiate online or via the portal.**
- ☐ **Secure messaging supports streamlined communication for contraception refills, test result questions, pregnancy concerns, and routine follow-up, with clear internal triage workflows.**
- ☐ **Patients receive automated reminders (e.g., text or portal) about refills and follow-up so they can stay on top of their medications.**
- ☐ **Educational materials (e.g., contraception options, pregnancy milestones, menopause management, pelvic floor health) are easy to share digitally at or after the visit.**
- ☐ **Preventive care reminders for screenings, vaccines, prenatal appointments, postpartum follow-up, and chronic disease monitoring are automated and actionable for patients.**

Action Step: Choose one engagement feature to implement or optimize over the next 30 days — such as digital intake forms before visits, portal-based messaging for prescription renewals, or automated reminders for overdue screenings. Track changes in no-show rates, phone call volume, or message turnaround times.

5. Reduce Administrative Burden with AI-Enabled Workflows

Why It Matters: High visit volume, complex documentation, and multi-specialty coordination can stretch women's health teams thin. AI tools embedded in the EHR can decrease charting time, surface key insights, and streamline follow-up tasks — freeing clinicians and staff to focus on patients instead of paperwork.

Learn more about AI tools that can help your practice.

Checklist: Is AI Helping You Work Smarter?

- ☐ **AI tools are embedded directly into clinical workflows, assisting with transcription, note generation, med reconciliation, coding suggestions, and task creation — while keeping the clinician fully in control.**
- ☐ **Visit templates and notes are easy to customize for women's health, including contraception counseling, annual exams, , abnormal bleeding workups, and menopause visits.**
- ☐ **Clinicians can quickly access a longitudinal view of the patient's health, including preventive care, medications, pregnancy history, labs, imaging, and referrals, with one click.**
- ☐ **Referrals to OB, fertility specialists, oncology, urogynecology, pelvic floor physical therapy, or behavioral health are simplified with integrated networks, smart routing, and AI-drafted referral letters.**
- ☐ **Follow-up tasks, reminders, and population health dashboards help your team close care gaps without building manual tracking lists.**

Action Step: Identify one high-friction workflow — such as external referrals, prior authorizations for imaging or medications, or documentation of complex visits. Use AI-enabled tools and standardized templates to streamline it this month, and monitor changes in turnaround times or staff satisfaction.

Your **Women's Health Practice** Growth Plan

Now that you've assessed key areas of your practice, create a simple action plan f to summarize key opportunities and next steps:

1. Top 3 Areas for Improvement

- _____
- _____
- _____

2. First Steps to Take

- _____
- _____
- _____

3. Completion Deadline: _____

About Elation

Elation helps primary care and women's health practices document faster, coordinate care, and get paid accurately with a clinical-first, AI-native EHR and integrated billing platform.

Our clinical-first platform helps clinicians:

- **Coordinate** preventive and reproductive care with longitudinal records
- **Standardize** annual, prenatal, postpartum, and problem-focused visits with AI-assisted templates
- **Manage** cervical, breast, bone, and cardiometabolic screening with guideline-informed workflows
- **Streamline** referrals to OB/GYN, fertility, oncology, behavioral health, and pelvic floor specialists
- **Engage** women securely through online tools, telehealth, and proactive reminders
- **Reduce** administrative burden with embedded AI for documentation, coding, and task management

Trusted by over 40,000 clinicians caring for 21 million patients, Elation empowers practices to deliver exceptional care efficiently, safely, and sustainably.

Join the growing number of practices thriving with Elation, delivering safer, smarter care while streamlining operations.

Learn More

