

First Five Years Community of Practice

January 20, 2026

Speaker:

Dr. Daniel Pepe

Moderator:

Dr. Eleanor Colledge



***Work smarter, not harder:
Managing your inbox and paperwork***



Family & Community Medicine
UNIVERSITY OF TORONTO

Land Acknowledgement

We wish to acknowledge this land on which the University of Toronto operates. For thousands of years, it has been the traditional land of the Huron-Wendat, the Seneca, and the Mississaugas of the Credit. Today, this meeting place is still the home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land.

About the First Five Years Community of Practice

- Designed for you!
- Free, fun and full of answers
- Sessions are highly practical
- Tap into the expertise of both speakers and colleagues
- Tonight's snack pairing: carrots & ranch dip
- Fully Accredited for 1 Mainpro credits per session



Moderators:

- **Dr. Eleanor Colledge**, CPD Program Director, University of Toronto and Family Physician, South East Toronto Family Health Team, Toronto, ON
- **Dr. Ryan Banach**, Family Medicine Early Career Supports Lead, Office of Health System Partnership, University of Toronto and Lead Physician, Norfinch FHO, Toronto, ON
- **Dr. Melinda Caputo**, Co-Chair, First Five Years CoP Scientific Planning Committee, Family Physician, Magenta Health, Toronto, ON

First Five Years Community of Practice

Disclosure of Financial Support

Financial contributions from the
Fidani Chair in Improvement and Innovation.

Potential for conflict(s) of interest:

N/A

Mitigating Potential Bias

- The Scientific Planning Committee has full control over the choice of topics/speakers.
- Content has been developed according to the standards and expectations of the Mainpro+ certification program.
- The program content was reviewed by a three-member national/scientific planning committee.



Dr. Daniel Pepe – Panelist

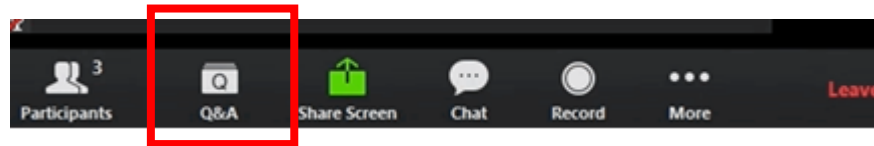
Clinical Lead, Office of Health System Transformation, London
Lambeth Medical Clinic

Speaker Disclosure

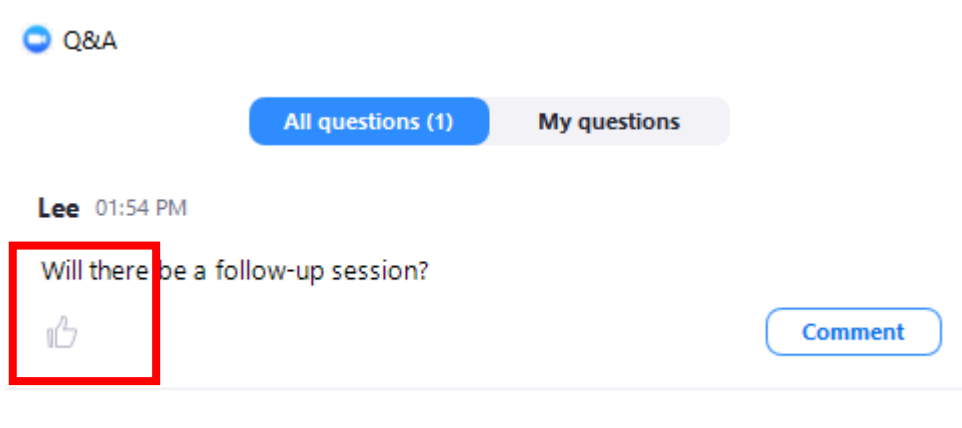
- Faculty Name: **Dr. Daniel Pepe**
- Relationships with financial sponsors:
 - Grants/Research Support: Infoway Connected Care Innovation Grant
 - Speakers Bureau/Honoraria: N/A
 - Others: N/A
- Faculty Name: **Dr. Ryan Banach**
- Relationships with financial sponsors:
 - Grants/Research Support: N/A
 - Speakers Bureau/Honoraria: OMA – Speaker for Billing and Practice Management
 - Others: DFCM OHSP – Salary, SGFP Tariff Committee, North-Western Toronto PCN Co-chair
- Faculty Name: **Dr. Eleanor Colledge**
- Relationships with financial sponsors:
 - Grants/Research Support: N/A
 - Speakers Bureau/Honoraria: Ontario College of Family Physicians
 - Others: DFCM Q&I – Salary, Foundation for Medical Practice Education - Stipend
- Faculty Name: **Dr. Melinda Caputo**
- Relationships with financial sponsors:
 - Grants/Research Support:
 - Speakers Bureau/Honoraria: First Five Years CoP Co-Chair, Foundation for Medical Practice Education
 - Others: N/A

How to Participate

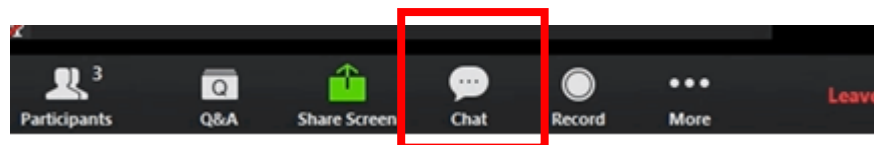
- All questions should be asked using the Q&A function at the bottom of your screen.



- Press the thumbs up button to upvote another guest's questions. Upvote a question if you want to ask a similar question or want to see a guest's question go to the top and catch the panels attention.



- Please use the chat box for networking purposes only.





Working Smarter

Inbox & Paperwork Management for New Family Physicians

“

"Practical, proven workflows to reduce inbox stress, finish on time, and protect patient safety."

”



Dr. Daniel Pepe, MD CCFP

Family Physician, London, Ontario

Start Strong: Build Habits Early

You can do this. Sustainable practice isn't about working harder—it's about simple systems that beat heroic effort every time.

FOCUS AREAS FOR TODAY

Schedule Design

Lab Results Workflow

Delegation

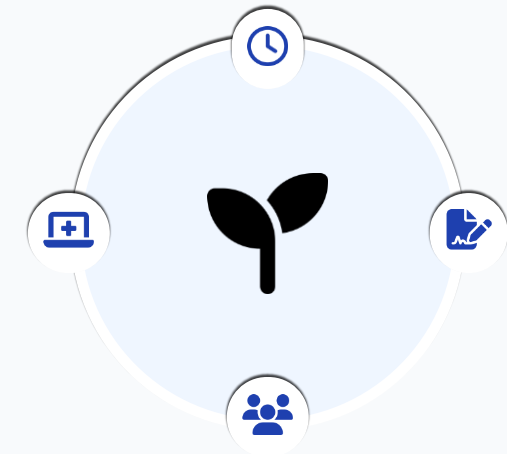
EMR Optimization

Paperwork Process



Our Goal

Fewer clicks, fewer re-touches, and more finishing at work—**not after hours.**



Compound Effect

Small workflow improvements in your first 5 years compound into thousands of hours saved over a career.

Schedule Design: Protect the Workflow

The schedule is the chassis of your practice. If you overload it, the engine overheats. You need structure to work smart.

Don't Jam-Pack Your Day

Resist the urge to squeeze everyone in. Protect your thinking time so you don't end up working through lunch or late into the night.

The "Morning Buffer" Strategy

That 90 minutes before the first patient isn't "free time"—it's high-value time for shared triage, result review, and team huddles.

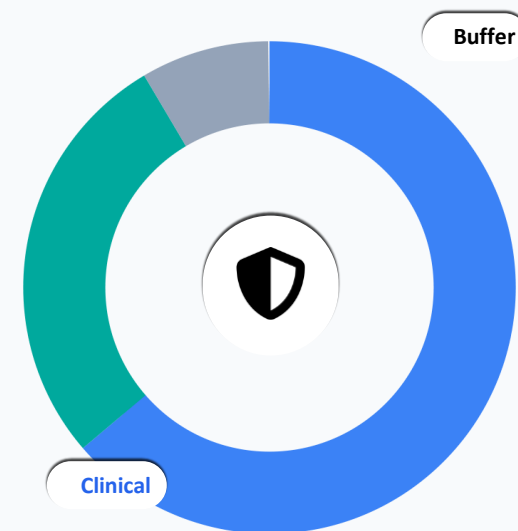
Physician-Supported Triage

Being available to answer staff questions immediately prevents back-and-forth messages and inappropriate escalations later.



Key Principle

Schedule capacity creates calm. "Admin time" is actually just indirect patient care time—schedule it as such.

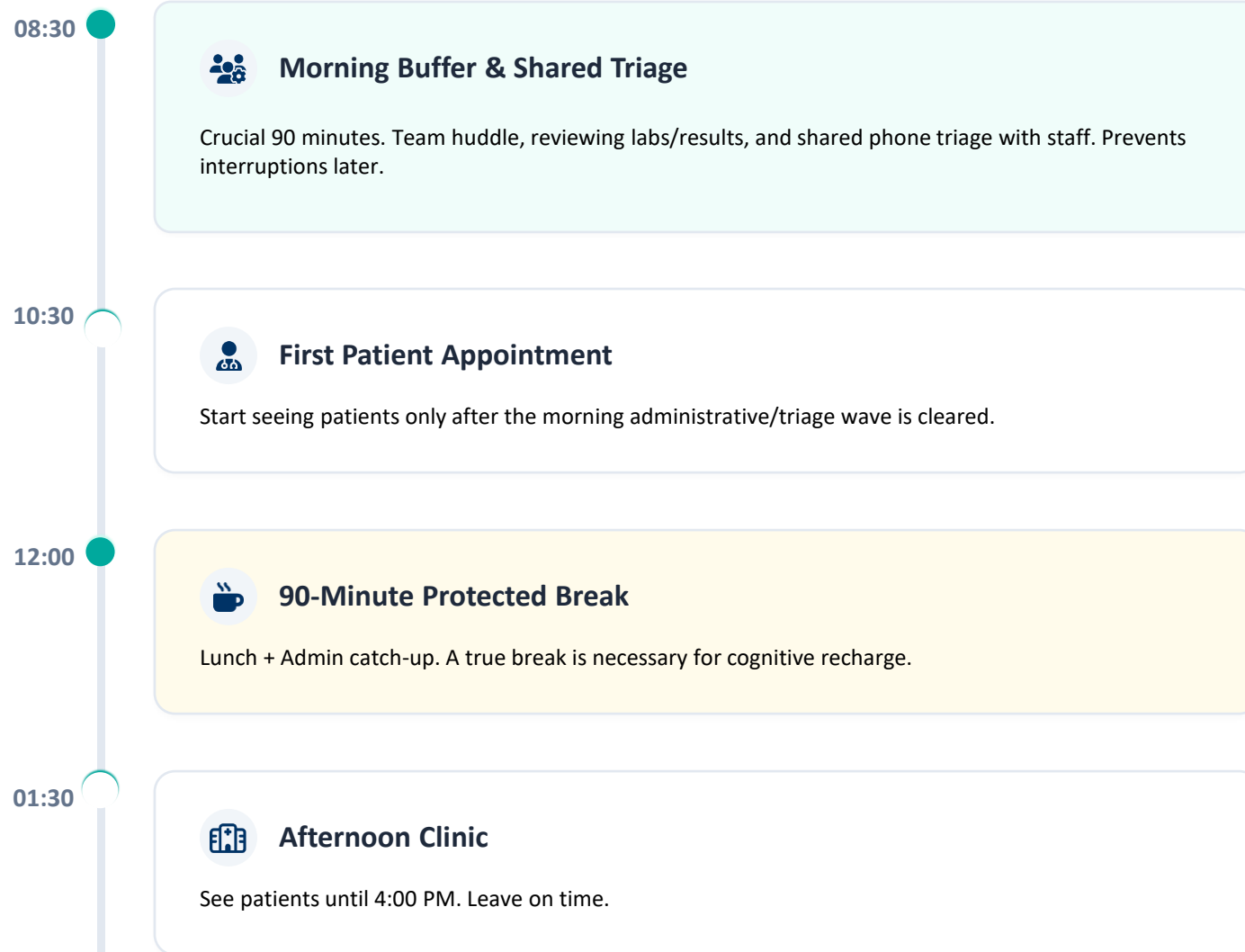


Defend Your Time

A protected schedule allows you to be present for patients when you are in the room, rather than worrying about the inbox.

Sample Day That Works

Don't jam-pack your day. Structure creates capacity.



SUSTAINABLE VOLUME 

25-30

Patients Per Day

Quality over Quantity

 **Weekly House Calls**
Built into the weekly template, not squeezed in.

"My first appointment is at 10:30. That morning morning buffer changes everything."

Physician-Supported Triage

Don't let your staff guess. By investing time upfront during the morning buffer, you prevent hours of cleanup and confusion later in the day.

Be Available:

Be physically or virtually present during the triage window to answer "quick questions" immediately.

First-Call Resolution:

Solve the problem in one touch. Prevent the "I'll ask the doctor and call you back" loop that doubles workload.

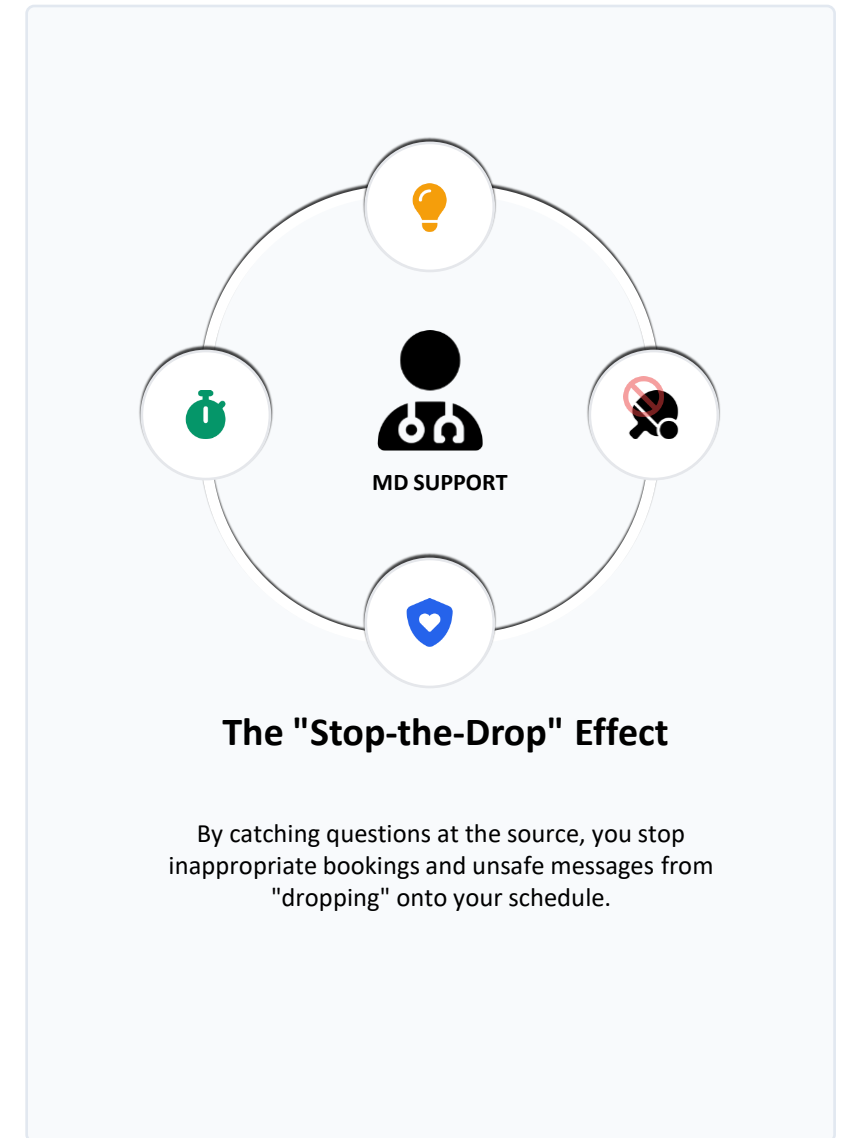
Real-Time Coaching:

Use this time to calibrate your team's judgment on what requires a visit versus a message.



The Golden Rule

Schedule creates capacity; **capacity creates calm.**



Lab Results: Principles That Save Time

⚠ THE PROBLEM

HRM + Faxes = Volume, Duplication, & Fragmentation

Single-touch Rule

Prep once, physician reviews once. Eliminate the cycle of "open, read, close, re-open."

Team-based Prep using SOPs

Delegate categorization and data extraction to staff before it hits your inbox.

Clear Routing Steps

Standardized "close-the-loop" actions for notification and filing.

📌 The Outcome

Faster, safer reviews and significantly **fewer missed items**.

WORKFLOW TRANSFORMATION



Team SOPs



Categorize & Extract



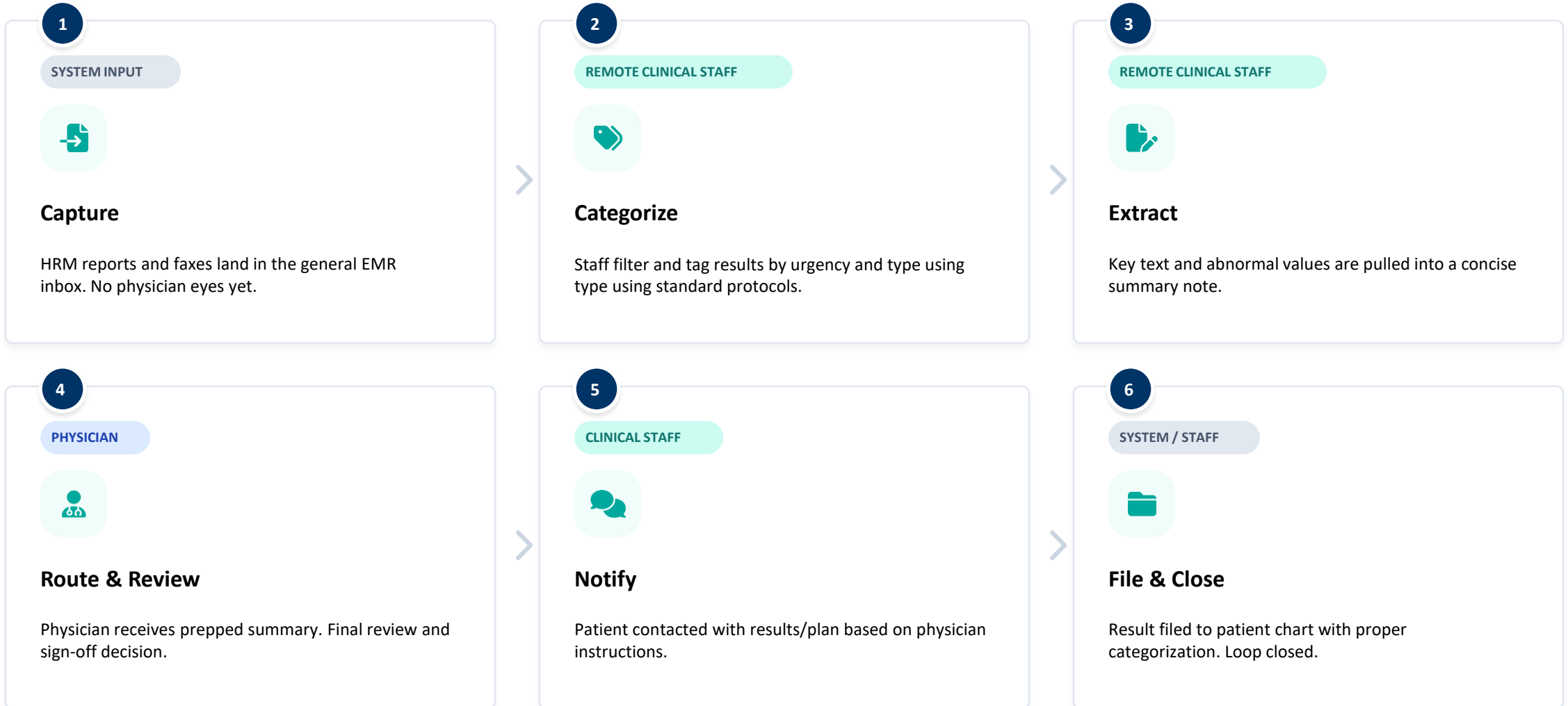
MD Review

One touch. Done.



Standard Lab Workflow (HRM + Faxes)

Single-touch rule: Team preps, Physician reviews once.



AUTOMATION ASSIST

Directive Assistant



Standardized Categorization

Uses clinical decision support rules to consistently tag and filter results, reducing "brain fog" fatigue.



Reduce Re-Reading

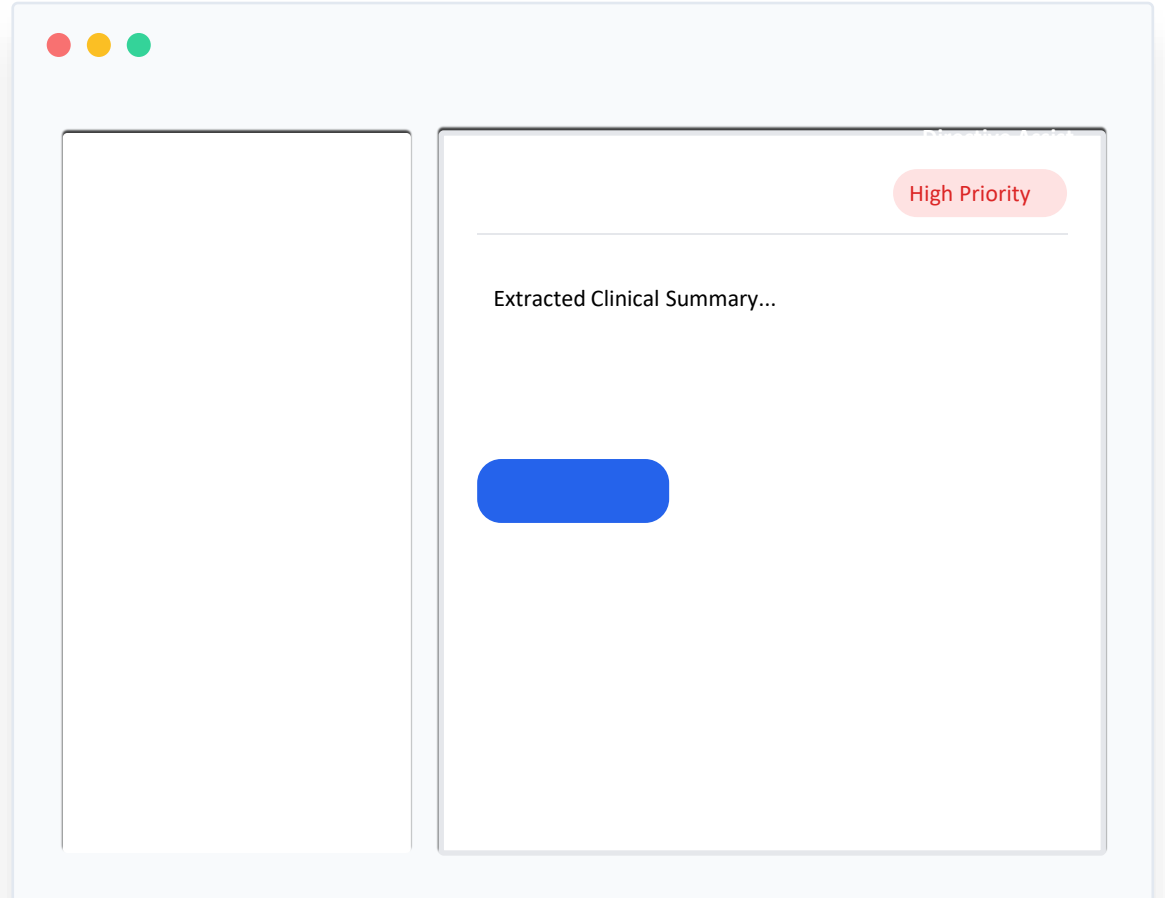
Key text is extracted and presented clearly. "Red/Amber" items are flagged for rapid priority review.



Next-Step Prompts

Consistent language prompts for follow-up actions (e.g., "Patient notified, return in 1 week").

💡 *Result: You review the medical decision, not the administrative clutter.*



CLINICAL DECISION SUPPORT INTERFACE

Delegation: Work to Top of Scope

Assign the right task to the right team member.



PRACTICE FACILITATOR

ADMIN & INTAKE

Form Intake: Receive and organize all incoming paperwork.

Appropriateness Check: Ensure payment received & forms are complete.

Redirection: Route to allied health (PT/OT) if MD input isn't required.



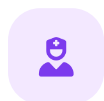
REMOTE CLINICAL STAFF

LAB & DATA PREP

Categorization: Tag incoming labs/faxes per SOP urgency.

Extraction: Pull key text/values into summary notes.

Preparation: Draft patient notification messages for MD approval.



MOA / NURSING SUPPORT

CLINICAL TASKS

Simple Notes: Complete sick notes & therapy referrals (PT/OT/Massage).

Patient Education: Standard counseling reviews.

Triage Support: Assist with shared phone triage protocols.



PHYSICIAN

MEDICAL DECISION MAKER

Final Review: Sign-off on prepped summaries and forms.

Complex Decisions: Manage abnormal/ambiguous results.

Exceptions: Handle cases that fall outside standard SOPs.

Shared Phone Triage: First 90 Minutes

Co-Triage Morning Huddle

Sit with staff for the first 90 mins (8:30–10:00). Review the queue together to set the day up right.

Scripting & Decision Support

Train on key distinctions in real-time: Urgent vs. Routine, Message vs. Visit.

The Outcome

Fewer back-and-forth messages, better booking accuracy, and ensuring the right care at the right place.

Why this works

"When you invest time upfront to answer questions, your staff stops guessing. You prevent the inbox from exploding before it starts."

Decision Flow



URGENT

"Please go to ER immediately."



VISIT

"Dr. Smith needs to see this. Booking 15m."



MESSAGE

"I will send a note to the doctor for you."

*Physician availability =
Confident Staff Decisions*

EMR Optimization: Telus, OSCAR, Accuro

Mastering your EMR is the highest-yield investment you can make. Stop typing the same things over and over.

Templates & Stamps: Pre-build common visit notes (SOAP), referral letters, and standard result responses.

Smart Phrases / Macros: Create shortcuts for symptom clusters, safety-netting, and counseling points.

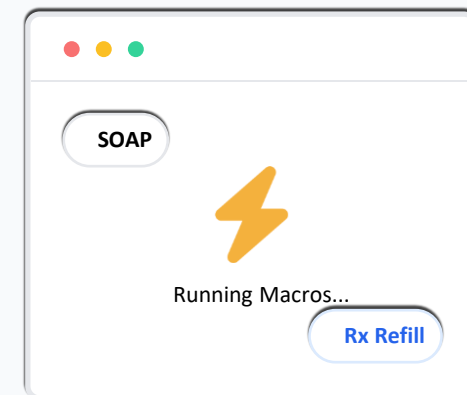
Inbox Hygiene: Use filters/tags to separate 'FYI' from 'Action'. Create 'Hot' (Today) vs. 'Cold' (Later) folders.

Order Sets: Bundle recurring orders (e.g., Diabetes Annual, Prenatal Panel) to save clicks.

Team Flags: Make handoffs visible—know exactly who did what and when.

Quick Win

Spend 30 minutes this week creating just 3 key macros for your most common visits. It will save you hours by the end of the month.



Efficiency Engine

Your EMR should work *for*
you, not against you.
Automate the predictable.

50%

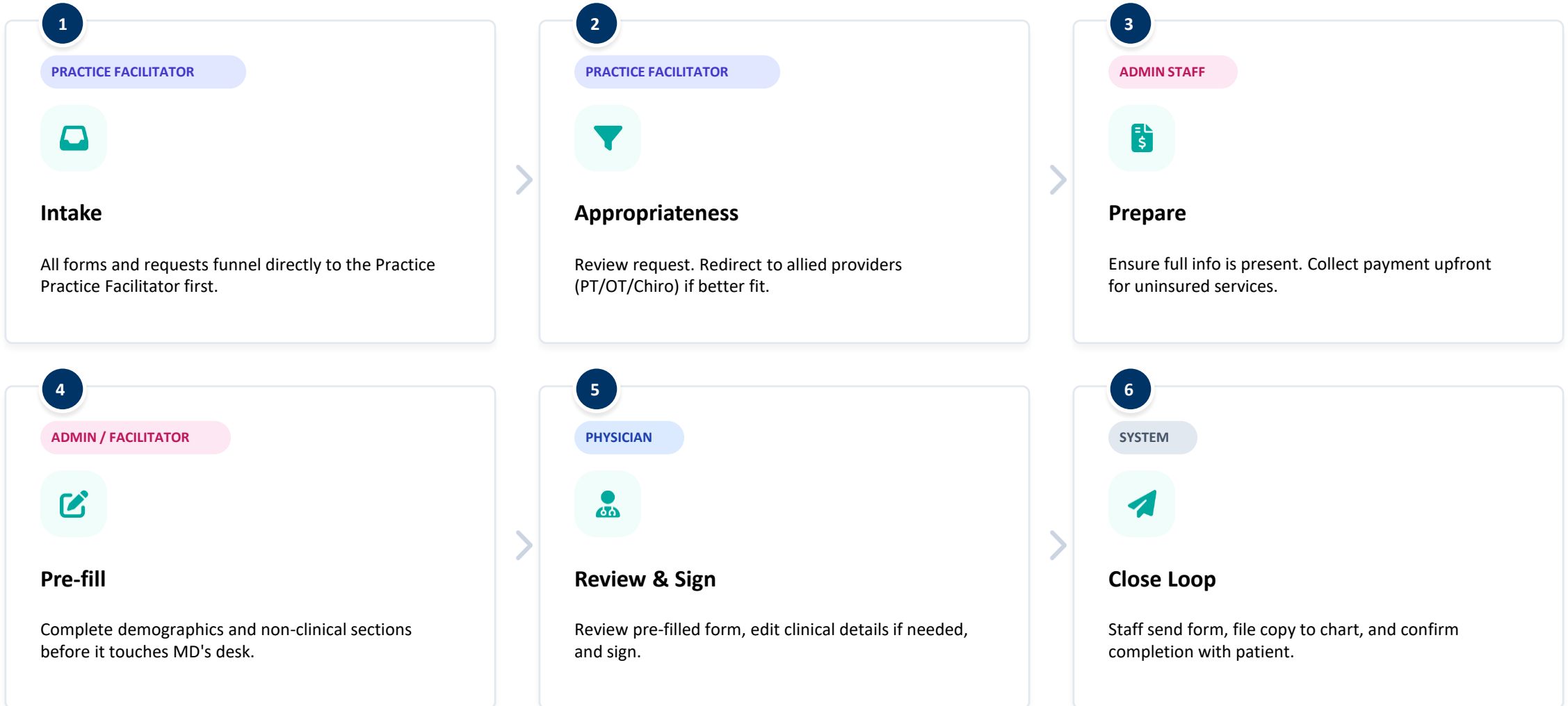
LESS TYPING

2x

FASTER NOTES

Paperwork: Pre-Triage First

Shift the burden: Facilitator intake → Prep → Quick Review.





DEPARTMENT OF FAMILY MEDICINE

First Five Years Community of Practice

Thank You

"Start small, be consistent, and reclaim your time."



Dr. Daniel Pepe, MD CCFP

Family Physician, London, Ontario

Upcoming sessions

Our next First Five Years Community of Practice sessions:

From 7 – 8pm:

Feb 24, 2026: Getting started with financial planning

March 24, 2026: Patient referrals: using eConsult, eReferral and SCOPE

Registration is now open on the [First Five Years CoP website](#).



Evaluation

Please take a moment to complete the evaluation:



We will also email the link to you directly.