Preparing for Electronic Labs: Defining Processes and Accountabilities for Shared Practice Management

AFHTO: October 26, 2011

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Department of Family Medicine

McMaster Family Health Team

Disclosures

Presenters perceive no conflict of interest with this presentation.

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Objectives

- ✓ Introduce Stonechurch Family Health Centre
- ✓ Highlight OSCAR our EMR system
- ✓ Describe our current paper lab management process
- ✓ Provide an overview of the OSCAR inbox
- ✓ Discuss our go live planning and communication strategy
- ✓ Present our final inbox plan
- ✓ Discuss lessons learned

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An Introduction to our Clinic …

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An Introduction to our Clinic …

- ✓ Provide primary care for approximately 15,000 patients in Hamilton and surrounding area.
- ✓ Clinical teaching unit affiliated with McMaster University and Hamilton Health Sciences
- ✓ Three teams of family doctors, nurses, allied health professionals and support staff
- ✓ Academic and community physicians
- ✓ Teaching and research

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OSCAR McMaster: Our EMR System

- ✓ Scheduling, E-charting, prescribing
- ✓ Billing functions
- ✓ Chronic disease management tools, disease registry
- ✓ Preventions module
- ✓ Registration and rostering management
- ✓ Referral system
- ✓ Decision alerts
- ✓ Secure messaging
- ✓ Reminders/task assigning

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An Introduction to our Team …

- ✓ Team A:
  - ✓ 6 academic physicians
  - ✓ 3 community physicians
  - ✓ 4 part-time locum physicians
  - ✓ 21 Residents (6-9 full-time at any time)
  - ✓ 4 RN(EC)
  - ✓ 2 RPN
  - ✓ 8 Support Staff
- ✓ 2010-2011 – 26,000 encounters

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Test Results Management
Guiding Principles

- ✓ Vital to quality patient care
- ✓ Failure to follow-up can lead to harm
- ✓ Results managed in a complex health care system
- ✓ Good communication is fundamental
- ✓ Well defined process and accountabilities
- ✓ Patients must be appropriately informed

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System Requirements

- ✓ Electronic or paper-based systems:
  - ✓ Systems for follow-up in place
  - ✓ Record all tests ordered
  - ✓ Record all results reviewed
  - ✓ Identify high risk patients
  - ✓ Communicate clinically significant results
  - ✓ Record patient follow-up

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Lab Management
Current Paper Based Process

Team based approach
MRP accountabilities
Resident accountabilities:
    First review, follow-up and sign off
Nursing accountabilities:
    Practice coverage, scan for urgent results
Support staff roles:
    Preventions, scanning, call backs

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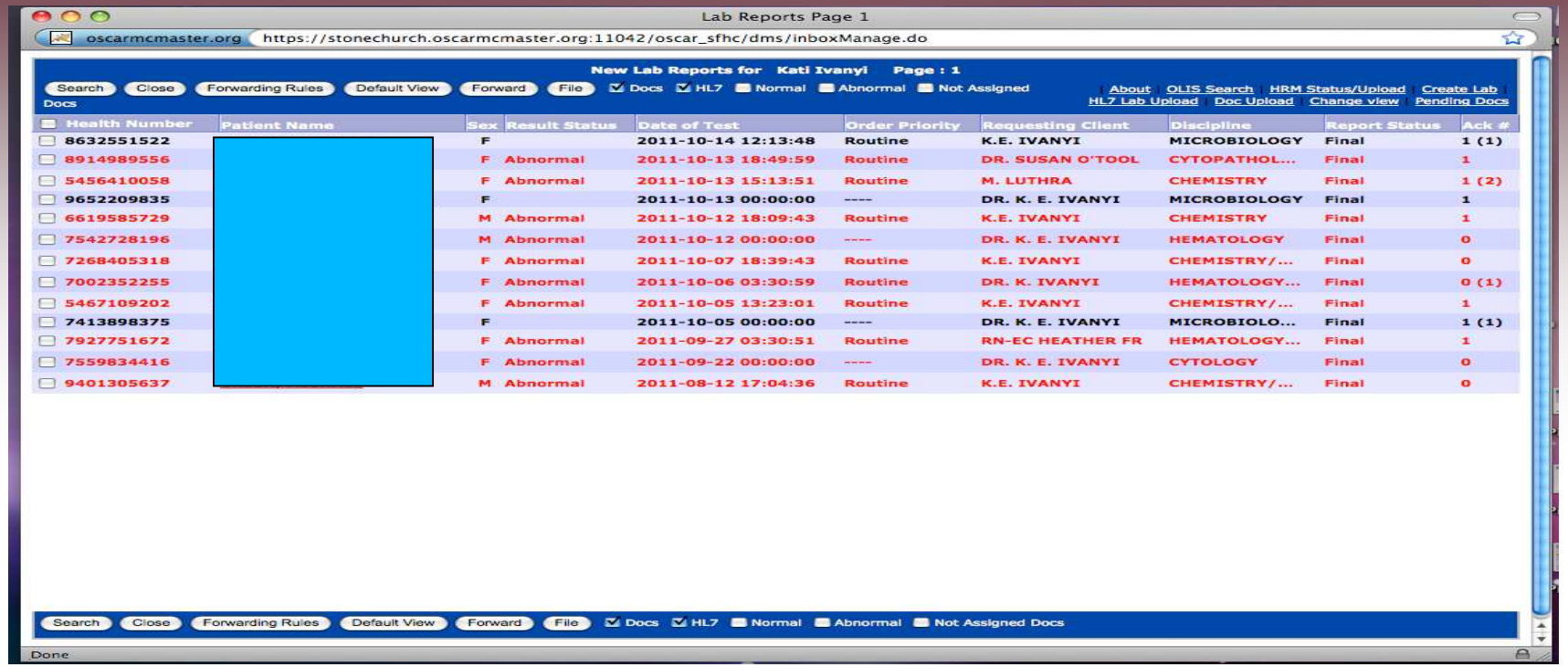
OSCAR Inbox: System Overview



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OSCAR Inbox: System Overview

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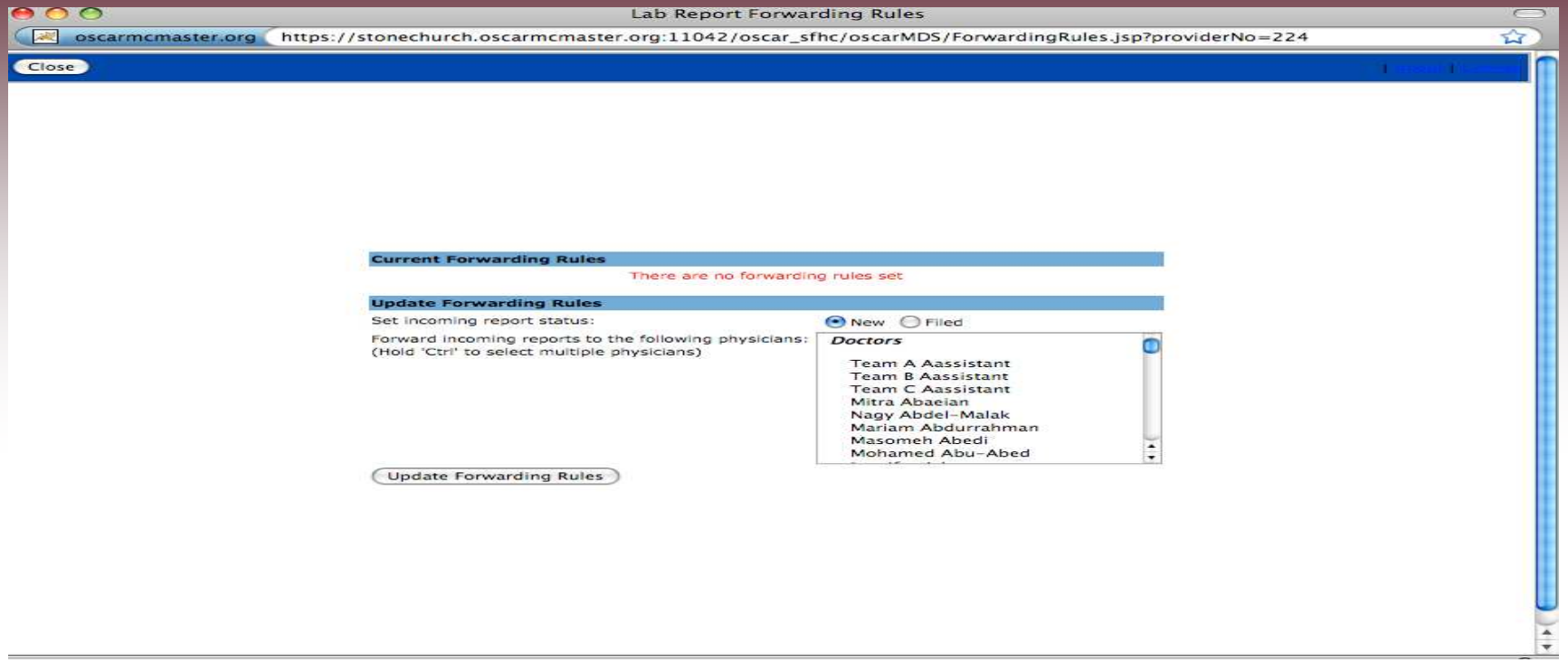

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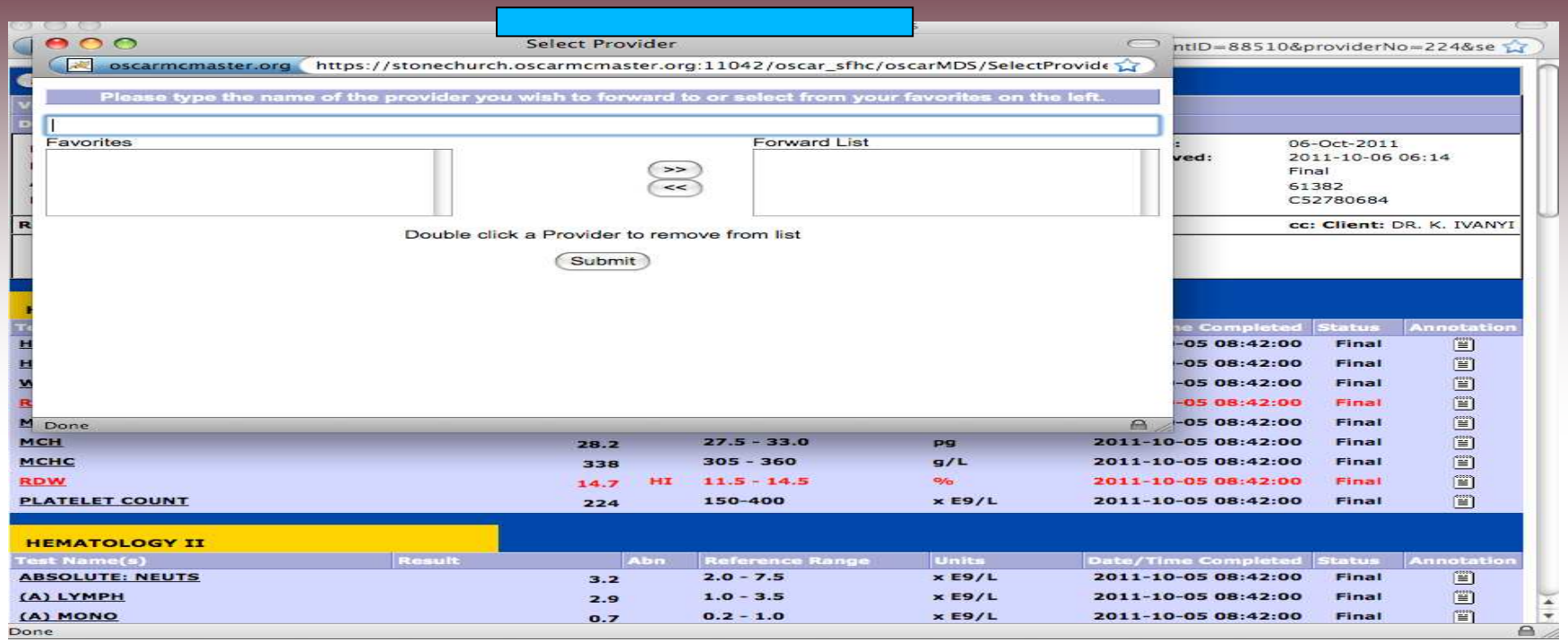

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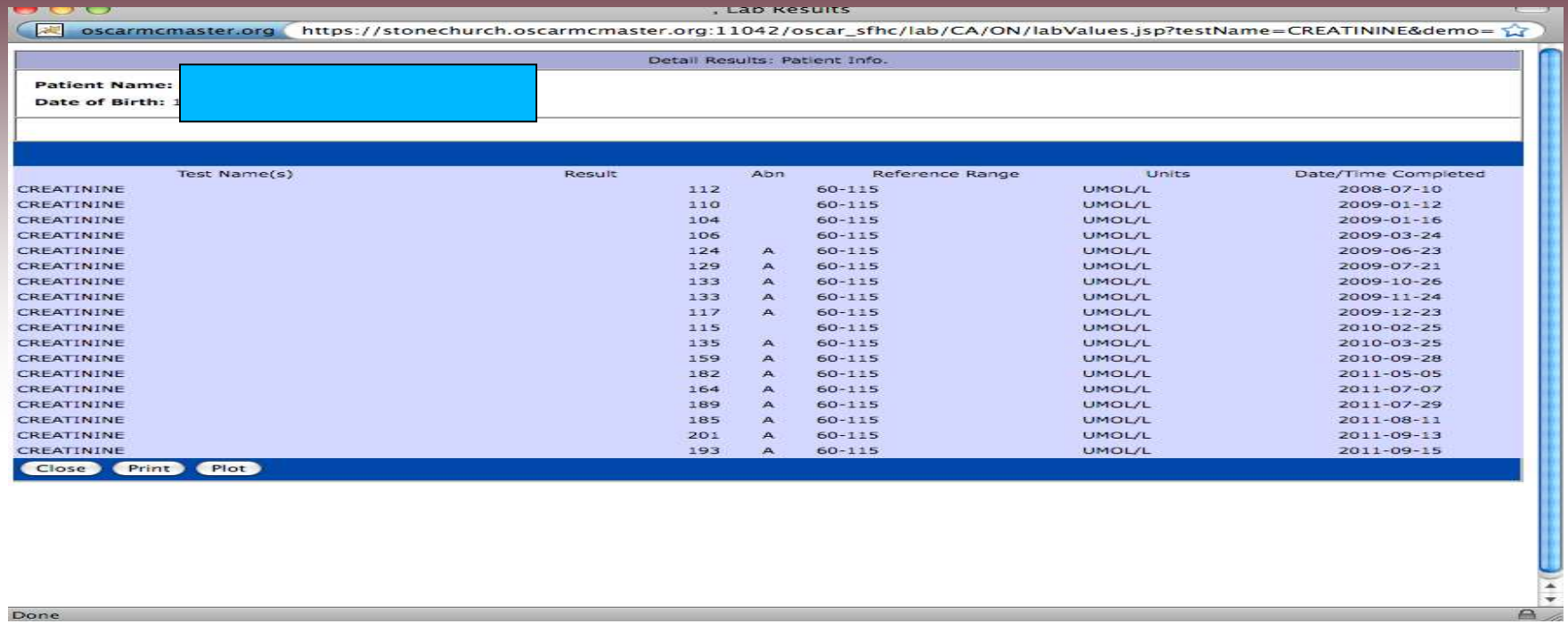

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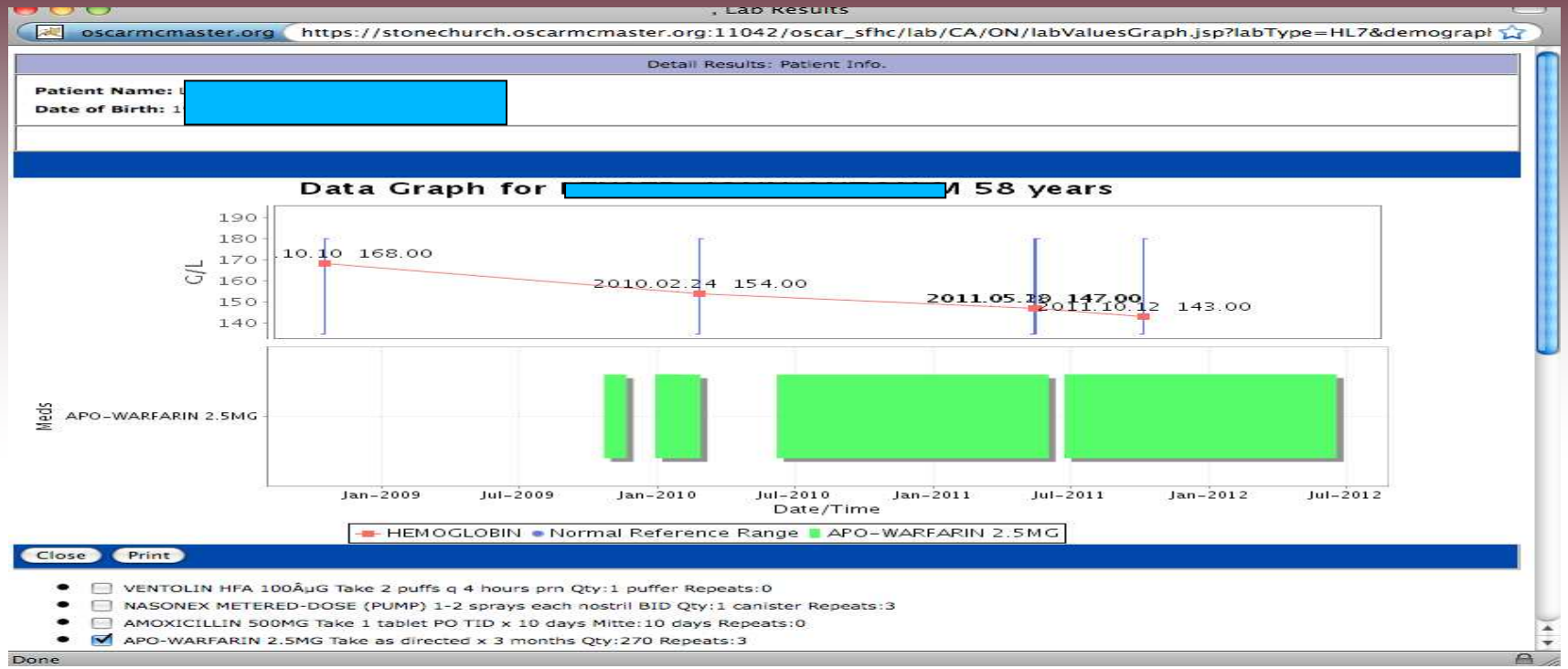

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Electronic Inbox: Team Process Plan

- ✓ Lab review process
  - ✓ MRP
  - ✓ Residents
  - ✓ Nursing
  - ✓ Locum physicians
- ✓ Acknowledging labs defined
- ✓ Lab review follow-up and communications
- ✓ Labs ordered by Specialty Programs
- ✓ INR follow-ups
- ✓ Inbox coverage plans

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Electronic Inbox: Go Live Planning and Communication Strategy

- ✓ Ensure all physicians / NPs receiving e-labs (assumption #1!)
- ✓ Familiarize all clinical staff with the "inbox“, start to use the e-labs already streaming – Lifelabs and CML
- ✓ Adding Gamma-Dynacare to electronic labs being received
- ✓ Purging everyone’s inbox, to be able to start prospectively
- ✓ Starting process-mapping on each team: Inbox management/ coverage/forwarding rules
- ✓ In-services, hands-on training (depending on individual needs)

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Electronic Inbox: Go Live Planning and Communication Strategy

- ✓ Once supervisors comfortable, involving learners – all staff doctors adding full-time residents to their forwarding rules, so they can start receiving and managing labs from their supervisor's practice
- ✓ Training all support staff with scanning/uploading using the new improved process
- ✓ Committing to a date when we turn off the paper for CML/Lifelabs/Gamma and go LIVE with our electronic labs (Had been May 1!!)

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Electronic Inbox: Go Live Planning and Communication Strategy

- ✓ Other patient results/consults/radiology reports which we receive on paper NOT affected at this point
- ✓ Once this phase completed, we can start seeing exactly how much scanning/uploading is left
- ✓ Start next stage of process-mapping – scanning/uploading everything FIRST, with clinicians reviewing all patient results electronically
- ✓ Stay tuned!!

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Electronic Inbox: Quality Assurance Review

- ✓ All clinicians receiving e-labs?
- ✓ Updates required for going live, to ensure practice management/communication?
- ✓ All e-labs being received?

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Electronic Inbox: Lessons Learned

- ✓ Timeline …
- ✓ Never assume …
- ✓ The best allies …
- ✓ An iterative loop …

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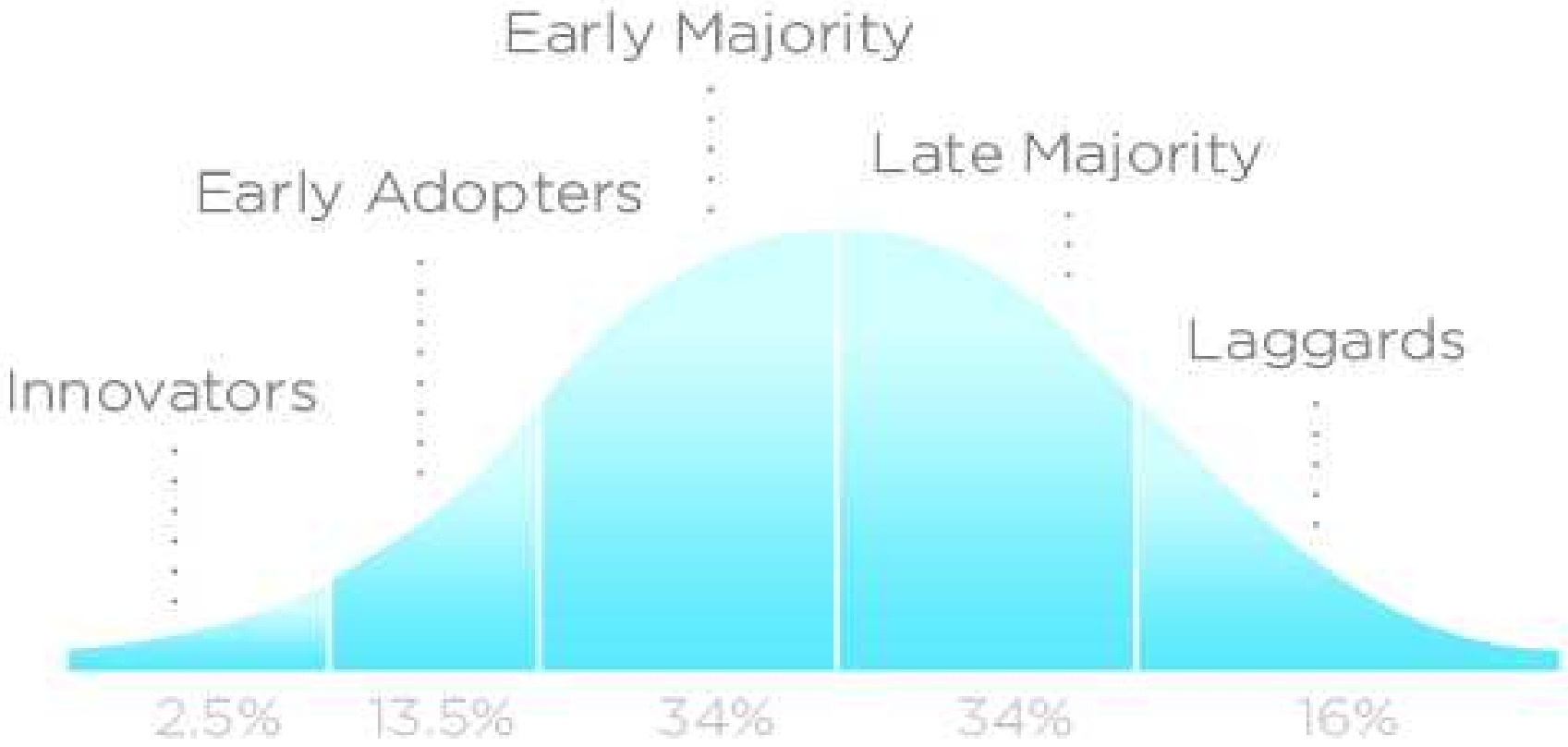

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Thank You!

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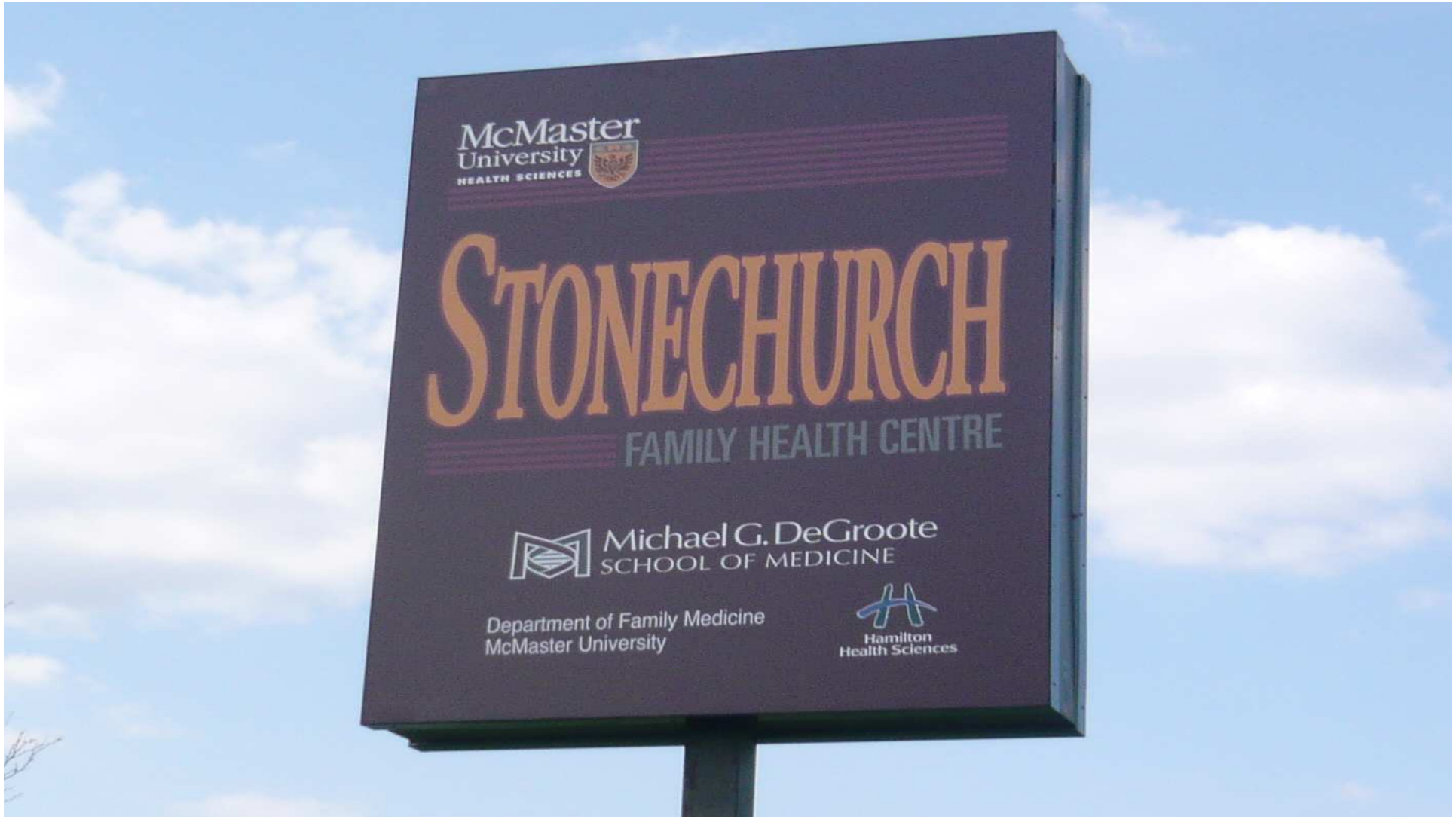
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