



Electronic Documentation: Informed by Evidence and Creating Evidence

Vicki Lejambe – Advanced Practice Consultant
Helene Lacroix – Director Program Advancement

Objectives

- **Saint Elizabeth Health Care**
- **The benefits of electronic documentation**
- **Designing an e-documentation system**
- **Strategies to consider for:**
 - ✓ **Implementation**
 - ✓ **Engagement**
 - ✓ **Evaluation**

Who is SEHC?

- **A Canadian not-for-profit charitable organization**
- **Caring for our communities for 100 years**
- **Over 3.3 million home visits in 2008**
- **Accredited health care organization**
- **A 50 Best Employers in Canada in 2007 & a Best Workplace in Canada**
- **Provincial / National / International Care provision**

Our Vision

To honour the human face of
healthcare

One dream

One team

One *vision...*



Evidence Informs Decision Making

- **Why bother with electronic documentation?**
 - Link interventions to outcome measures
 - ↑ access to best practice resources
 - Integrate best practice resources into documentation
 - Begin discussions with staff early
 - Provide leadership the language to discuss with staff eg. scripts, list of questions

Selecting the Hardware



Designing an E-Doc System

Partnership between professional practice and

To develop or to buy

M-Brace: Our Vision

M-Brace the Future



The image shows a screenshot of a web application interface for "medshare eMotion". The interface features a login form with the following elements:

- medshare eMotion™** logo at the top center.
- User Name:**
- Password:**
- Domain:**
- Remember Me
- Login** button
- Cancel** button
- Version: 1.0.824.3 (Azure) at the bottom left.

The background of the screenshot shows a blurred view of a patient's medical record, including sections for "Case Details" and "Risk Factors". A yellow banner at the top of the record displays the name "ELIZABETH SMITH".

E-Motion: Our Vision

Wireless Access+

E-documentation

- Improve just in time access to information
- Streamlined care delivery processes
- Seamless electronic interchange between health care team members
- Efficiency, effectiveness, quality of health record & safety

Opportunities Created with E- Doc

- **Efficiency**
 - ↓ duplication
 - Streamlining processes
 - Quality

Opportunities Created with E- Doc

- **Effectiveness**

- Access to decision support resources
- Evidence driven care & documentation
- Standardized care & documentation

Opportunities Created with E- Doc

- **Knowledge Creation**
 - ↑ capacity for chart audits → reports
 - ↑ capacity for capture of client outcomes

Opportunities Created with E-doc

- **Safety**
 - Nurses could now have access to referral at all times
 - Emergency contact information & codes are all right there

Other Opportunities with E- Doc

- **Going green**
- **Cost effective**
- **Improved communications**
- **Staff satisfaction**
- **Possibly address retention & recruitment issues**

Challenges Unique to our Setting

- **New referrals come and nurse may already be out in the community so verbal messages of orders/care required and client specifics**
- **Management of communication between agencies**
- **Access to IT support**

The Project Charter: Scoping

- **Phased approach**
 - Phase 1: creation of forms + new process flows
 - Phase 2: adding functionality and decision tools
 - Phase 3: 1 form → HOBIC assessment
- **Project management approach**

E-Motion: Maintaining Caseloads

MedShare eMotion

Home

Open Case | Sort | Print Cases | Power Tools | My Profile

My Case Load

Health Care Cases

| | | | | | | | |
|----------------------|--|----------------|----------------|---|---|---|----------|
| BATSON, KENNETH | 140 BRIDGE, APT. 103, WINDSOR, ON, N9B 3R8 | (519) 256-4094 | VISITING NURSI | 0 | 0 | 0 | 06/15/09 |
| WINDSOR, ON, N9A 4N3 | | | VISITING NURSI | 0 | 0 | 0 | |
| WINDSOR, ON, N8X 1R5 | | | VISITING NURSI | 0 | 0 | 0 | |
| WINDSOR, ON, N9B 2N6 | | | VISITING NURSI | 0 | 0 | 0 | |
| WINDSOR, ON, N8A 3Y7 | | | VISITING NURSI | 0 | 0 | 0 | |
| WINDSOR, ON, N8X 4S2 | | | VISITING NURSI | 0 | 0 | 0 | |
| WINDSOR, ON, N9B 2J5 | | | VISITING NURSI | 0 | 0 | 0 | |

Case Details: BATSON, KENNETH
Customer: WE-ES CCAC VISIT NURSING | Primary HCW: CTN #: 10210994

MedShare eMotion

Home | Case | Case Details | Addresses | Contacts | eHealth Record | Progress Notes | Wound Care

Client Case Details

BATSON, [REDACTED] | D.O.B.: 08/28/1936

Health Card #: 6061717537 KH | Risk Factors: | Notes:

Sex: M | Language(s): ENGLISH

Service Information

Case Manager: B7 229

Service: VISITING NURSING | Priority: VH18 | Diagnostic Codes: 496 - CHR AIRWAY OBSTRUCT NEC

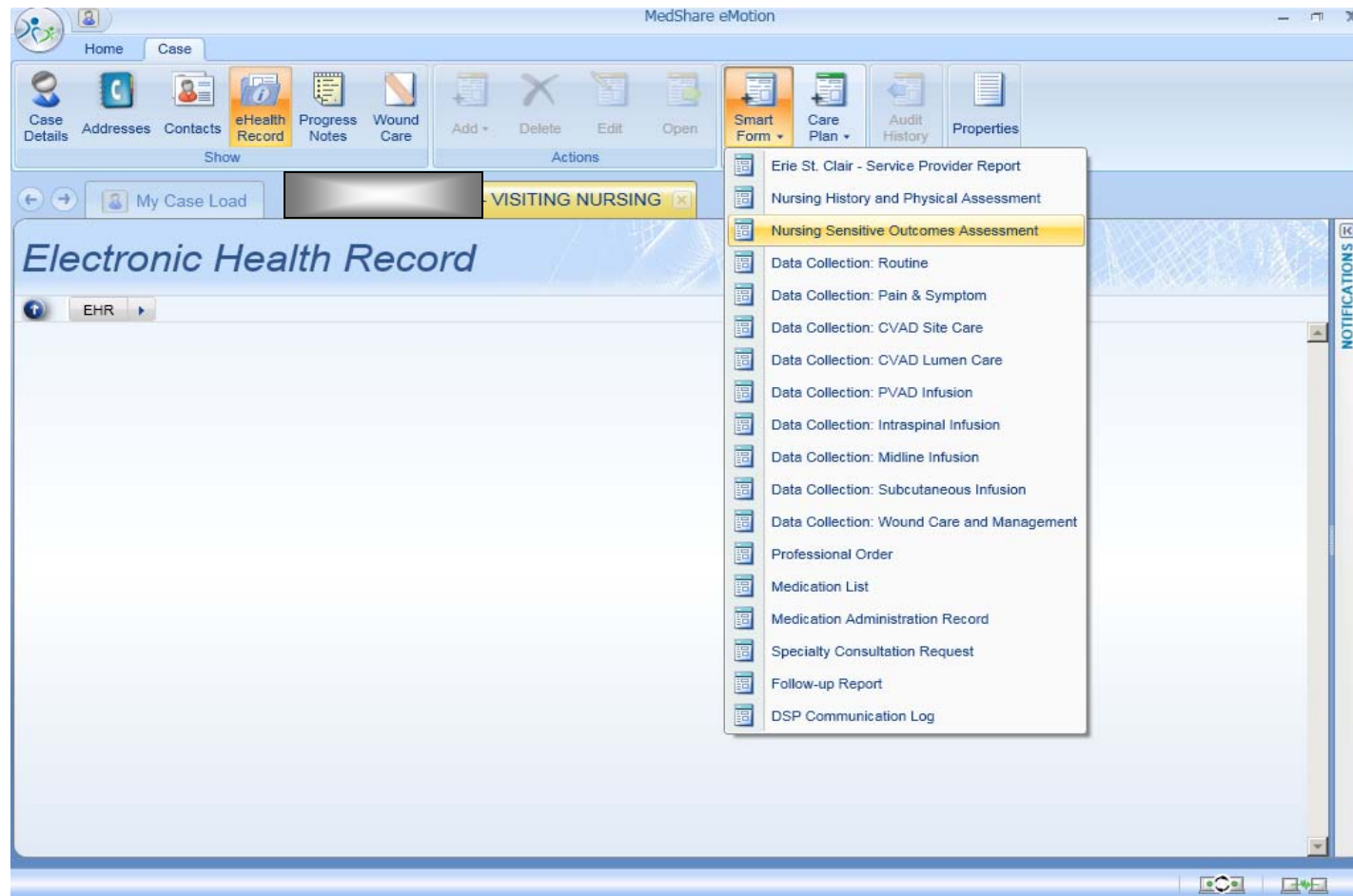
Customer: WE-ES CCAC VISIT NURSING | First Visit By:

CTN: 10210994

Primary Contact

Primary HCW

E-Motion: Creating the Chart



E-Motion: HOBIC Assessment

Smart Form Manager - HOBIC Assessment - - 06-18-2009

Smart Form

Save Print Email Exit Entry

Actions Add New

HOBIC Assessment - - 06-18-2009

| | |
|--|-----------------|
| Date Created | 6/18/2009 16:30 |
| Assessment Type | Admission |
| ADL Self-Performance - last 3 days | |
| Mobility in Bed | |
| Transfer | |
| Locomotion in Home | |
| Locomotion Outside of Home | |
| Dressing Upper Body | |
| Dressing Lower Body | |
| Eating | |
| Toilet Use | |
| Personal Hygiene | |
| Bathing | |
| IADL Self-Performance - last 7 days | |
| Meal Preparation | |
| Ordinary Housework | |
| Managing Finances | |
| Managing Medications | |
| Phone Use | |
| Shopping | |

HOBIC Assessment - - 06-18-2009 - Version 1

Process Changes:

The human side of e-documentation

- **Fax based communication → email**
- **Documentation on the tablet in the client's home**
- **Completing all aspects of care during the actual visit**
- **Communicating with the circle of care**
- **Auditing records**
- **Health records storage**

Strategies for Implementation: Model for Improvement

- **Hardware**
 - Getting used to using the tablets
- **Interfaces**
 - With electronic scheduling software
 - Over wireless connection
- **Software**
 - Learning to use the forms
 - One form at a time
 - In a lab setting, using case studies
 - In parallel to usual documentation

Implementation Strategy: Progressive

- **Principles**
 - Manageable groups
 - Manageable risk
 - Anticipated outcomes

Staff Engagement

- **Small group training**
- **Access to decision tools**
- **Follow-up teleconferences**
- **Change management strategies**

Evaluation Strategy

- **Satisfaction**
 - With education
 - With technology
 - With documentation tools
 - With processes
- **Cost / benefit analysis**
- **HOBIC assessments completed**
- **How nurses use outcome data**

Outcomes to Date

- **Staff satisfied with the education and would like more role playing in how to complete HOBIC**
- **Within the first week we have over 20 HOBIC admission assessments completed**
- **Staff felt many of the outcomes they did but never documented**
- **Therapeutic self-care was new to them**
- **Staff want it all... "what's next"**

Questions



vlejambe@saintelizabeth.com