Creative Patient Tracers

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Objectives

1. Discuss Use of Patient Tracers
2. Explore Use of Tracer Tools
3. Brainstorm Implementation

The function of education is to teach one to think intensively and to think critically. Intelligence plus character - that is the goal of true education.

Martin Luther King, Jr.
1. Discuss Use of Patient Tracers

   - Purpose
   - Basics
   - Benefits
   - Use in Education

Traditional Use and Purpose of Patient or System Tracers

- Accreditation Preparation
  - Identify Potential Deficiencies

- Quality Improvement /Quality Assurance
  - Highlight Areas for Improvement

Tracer Basics:

- Evidence Based Practice
  (i.e. Joint Commission National Patient Safety Goals)

- Clinical Practice Guidelines

- Organization Specific Policies & Procedures

- Benchmarking
Tracer Basics:

- Planning and Preparation
  - Schedule, Scope, Policy & Standards Review

- Criteria / Standards Developed
  - Checklist, Training

- Conducting and Evaluation
  - Time Allowance, Purpose Discussed, Observation Tips, Debriefing Session, Feedback Form Completion

- Analyzing and Reporting
  - Areas of Concern, Priority, Criticality, Action Needed

Benefits of Tracers

- A Quick Snapshot
  - Inexpensive and Efficient

- Real Setting
  - Monitor High-Risk and Problem Prone

- After the Fact
  - (No Observer-Expectancy Effect or Hawthorne Effect)

Pre-Op Patient Tracer Sample

- Planning and Preparation:
  - Purpose, Scope, Criteria, Standard & CMS regulation reviewed

- Criteria / Standards Developed:
  - Checklist developed and Peri-Op Educator Training done

- Conducting and Evaluation:
  - Schedule and Assignments made and communicated
  - Debriefing with participants and managers done
  - Feedback results summarised

- Analyzing and Reporting:
  - Gaps in knowledge, skill, and attitude identified
  - Corrective action plan established for critical items
Tracers as an Educational Tool

Patient tracers can be used for more than accreditation preparation! They can be used for educational assessment and evaluation methodology.

Example: Required Staff Education and Training per Joint Commission Standards

Checklist included in handouts from The Joint Commissions Big Book of Checklists

Tracers Pre-Education

Tracers can be used to identify areas where education is needed.

1. Complete a tracer in a high-risk or problem prone area
2. Identify deficiencies
3. Determine whether education is appropriate (i.e. knowledge or skills problem)
4. Plan and complete education activity
5. Complete another tracer to evaluate results

Tracers Post-Education

OUTCOMES, OUTCOMES, OUTCOMES!!!

Can be used to measure impact of education at intervals of 3, 6, & 9 months after the educational activity.

Education is what survives when what has been learned has been forgotten. B.F. Skinner
Educational Tracer Tool

Person Conducting: Morgan Smith, RN
Department or Unit: Outpatient Surgery Center
Date/Time: 9/15/17 3-4 pm
Participating Staff: Molly May, RN; Susan Jones, RN; Sharon Taylor, CRNA; Dr. Joe Thomas; Stella Stor

Description of Tracer: Observation of Procedure from Pre-Op to Intra-Op phase

Questions / Criteria

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Y</th>
<th>N</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Was the pre-operative checklist completed and signed by an RN?</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Was the H&amp;P reviewed for completion within 30 days? If not, Is there evidence of a review and an update prior to procedure?</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Review and physical exam was completed immediately prior to the procedure start, but time stamp and signature was done after the procedure.</td>
<td>X</td>
<td></td>
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<tr>
<td>4.</td>
<td>Was the anesthesia assessment completed prior to the procedure?</td>
<td></td>
<td>X</td>
<td></td>
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<td>5.</td>
<td>Was the informed consent present, signed, witnessed?</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>6.</td>
<td>If indicated, did the patient receive an appropriate antibiotic within 60 minutes of procedure start?</td>
<td></td>
<td>X</td>
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<tr>
<td>7.</td>
<td>Was the surgical site verified with the patient and was surgical site marking completed?</td>
<td></td>
<td>X</td>
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<tr>
<td></td>
<td>Is documentation included in the medical record?</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>8.</td>
<td>Time out was called, all staff participated, and verbal agreement from all present was done?</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>9.</td>
<td>Actual time of the time out completion was entered into the medical record.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>Elements of time out process were missing – consent form was not viewed. CRNA was involved in equipment check while participating in time out process.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

Learning Gap(s) Identified: 1. Additional education needed for documentation requirements for surgeons. 2. Additional education needed for full participation of all time out process. 3. Compliance audit needed for CRNA involvement in time out process.

Corrective Action Planned: Meet one-to-one with physicians who failed to document, sign, and date stamp pre-procedure assessment when completed. Provide time out required elements at next staff meeting, revise tool to require signature for completion of each element, poster in each OR. Observe 20 time out processes for CRNA involvement and provide just-in-time training to CRNAs.
3. Brainstorm Implementation of Tracers

Activity

• Break into groups of 3-4 discuss how you have used the tracer methodology or how you plan to use in the future.

Summary

Patient Tracers can be Used for:
• Accreditation Preparation
  – To identify potential deficiencies
• Educational Tool
  – To highlight areas for improvement for educational needs assessment
  – To determine educational gaps and to determine outcomes
• Evaluation Methodology
  – To evaluate effectiveness of educational activity
Resources


QUESTIONS?