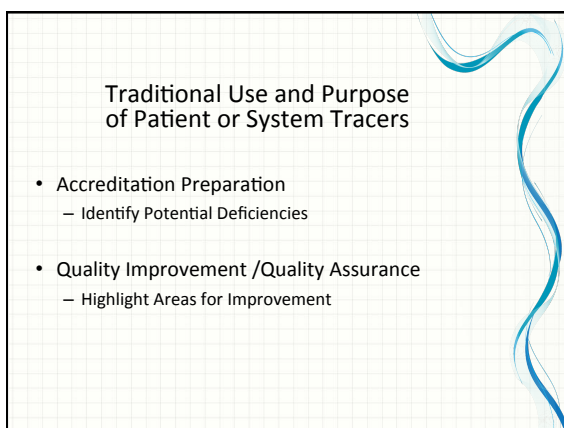


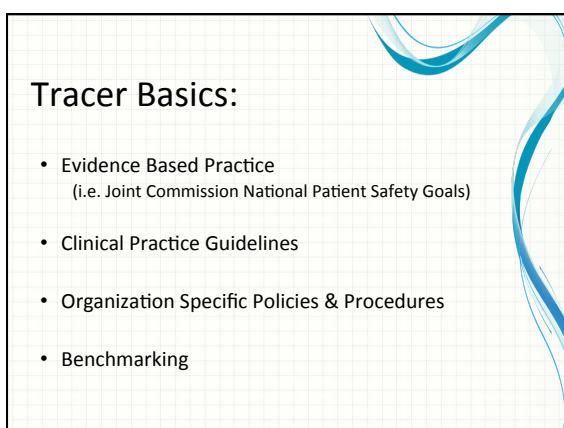
1 • Discuss Use of Patient Tracers

- 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 summarized

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

2

• Explore Patient Tracer Tool

Educational Tracer Tool					
Person Conducting:		Department or Unit:			
Date/Time:		Participating Staff:			
Questions / Criteria	Y	N	N/A	Issues Identified (Current State)	Gap(s) in KSA*
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

Learning Gap(s) Identified: _____

Corrective Action Planned: _____

*KSA = Knowledge, Skills, Attitude

Educational Tracer Tool					
Person Conducting: Morgan Smith, RN		Department or Unit: Outpatient Surgery Center			
Date/Time: 9/15/17 5:4 pm		Participating Staff: Molly May, RN; Susan Jones, RN; Sharon Taylor, CRNA, Dr. Joe Thomas; Stella Story, ST			
Description of Tracer: Observation of Procedure from Pre-Op to Intra-Op phase					
Questions / Criteria	Y	N	N/A	Issues Identified (Current State)	Gap(s) in KSA*
1. Was the pre-operative checklist completed and signed by an RN?	X				
2. Was the TMAP reviewed for completion within 30 days? If not, is there evidence of a review and an update prior to procedure?		X		Review and physical exam was completed immediately prior to the procedure start, but time stamp and signature was done after the procedure.	Knowledge of documentation requirements
3. Was the anesthesia assessment completed prior to the procedure?	X				
4. Was the informed consent present, signed, witnessed?	X				
5. If indicated, did the patient receive an appropriate antibiotic within 60 minutes of procedure start?	X				
6. Was the surgical site verified with the patient and was surgical site marking completed?	X				
7. Time out was called, all staff participated, and verbal agreement from all present was done? Actual time of the time out completion was entered into the medical record.	X		X	Elements of time out process were missing – consent form was not viewed. CRNA was involvement in equipment check while participating in time out process.	Knowledge or time out elements Compliance with time out policy

Learning Gap(s) Identified:


1. Additional education needed for documentation requirements for surgeons
2. Additional education needed for required elements of the time out process
3. Compliance audit needed for CRNA full participation 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.

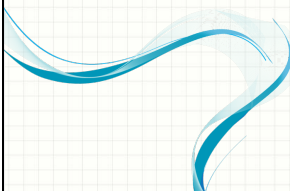
Observe 20 time out processes for CRNA involvement and provide just-in-time training to CRNAs.




3 • Brainstorm Implementation of Tracers

Activity

- Break into groups of 3 -4 discuss how your 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

1. Ailey, Sarah H., et al. (2015) "Tracer Methodology 101: Using Mock Tracers to Evaluate Care of Patients with Intellectual Disabilities, Part 1." *Joint Commission: The Source* 13.12: 4-6.
2. Bailey, Christine, et al. (2015) "A Health System's Approach to Successful Accreditation Utilizing Joint Commission's Infection Control Tracer Methodology." *American Journal of Infection Control* 43.6: S46.
3. Bass, Donna (2016) "Building Joint Commission Continuous Readiness in Partnership with Nursing Students." *Journal of Nursing Administration* Vol 44:Issue 1, 5-7

QUESTIONS?