Alberta Health Services

LAB RESULTS REVIEW & REPORTING PROJECT

PATIENTS DISCHARGED *with* LABS STILL PENDING
MANAGING LAB RESULTS USING SCM SPECIAL LISTS

A process for the Individual Physician Practice

INTRODUCTION

In a single year, there were **over 180,000 lab results** returned after patients were discharged from hospitals within the Calgary Zone. **Nearly 1 in 5** (19.1%) of these were classified as "abnormal," and the true number is likely higher because it does not include tests that cannot be flagged, such as pathology reports.

It was recognized by medical staff that a reliable and easy method is needed for tracking these pending lab tests in order to optimize safety and continuity of care for patients.

The Lab Results Review & Reporting (LR[3]) project has worked with a number of stakeholders to develop a process using SCM 'Special Lists' to ensure the lab tests that you ordered (and are therefore responsible for) can be reliably tracked.

Even if you are new to creating SCM lists, these instructions will walk you through the method of setting up your system, step-by-step.

Some care teams within the Calgary Zone are working as a group to manage results; this is particularly helpful during transitions when the ordering provider goes off-service or on vacation. A separate guide is available to describe how to set up a team-based follow-up process – visit www.ahs.ca/LR3 for more.

HIGH-LEVEL OVERVIEW *of the* PROCESS USING SCM LISTS

The diagram below shows the process in its simplest form. The pages that follow show you step-by-step how to set up and manage this system.

There is also a process described on page 4 that describes how to hand-off your list to a colleague when you go off-service or away on vacation.
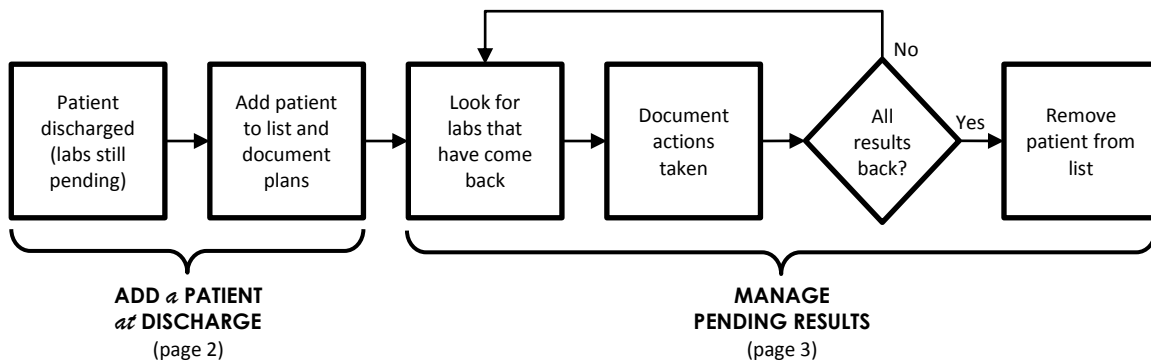
WHY?

Patients who are discharged from hospital with pending lab results are at risk because clinically important results can go unnoticed (e.g., a positive screen for a bacterial infection). Discharged patients typically do not remain on a care provider's SCM Patient List, and therefore any flags for new results are not seen in a timely way. This problem has led to adverse events for patients within the Calgary Zone, and is also a concern within other healthcare organizations.

GOING PAPERLESS

Lab printing may be stopping or may have already stopped in your area. Therefore the only one who will follow up on your pending results is *you*.
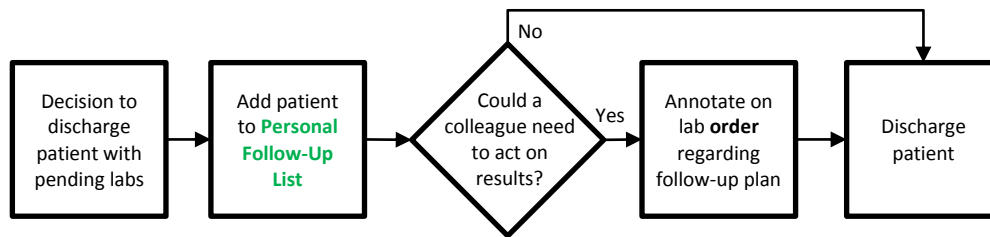
NOT JUST LABS!

SCM special lists can also be used to track pending results from Diagnostic Imaging tests!

```
Patient          Add patient                                            All
discharged  →    to list and    →   Look for    →   Document    →    results    →   Remove
(labs still       document          labs that        actions         back?    Yes   patient from
pending)          plans            have come          taken           ↑ No          list
                                     back                              
```

ADD *a* PATIENT *at* DISCHARGE
(page 2)

MANAGE PENDING RESULTS
(page 3)

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ADDING *a* PATIENT *to* YOUR LIST *at* DISCHARGE

When a patient is discharged with lab results pending, you can add the patient to an SCM special list to monitor for results that are returned for them. (If you have not yet created your special list, it will be created as soon as you add your first patient.)

```
                                                    No
                                          ┌──────────────────────────────────┐
                                          │                                  ▼
┌──────────────┐   ┌──────────────┐   ◇───────────◇   ┌──────────────┐   ┌──────────────┐
│ Decision to  │   │ Add patient  │  ╱ Could a    ╲  │ Annotate on  │   │              │
│ discharge    │──▶│ to Personal  │─◇  colleague   ◇─▶│ lab order    │──▶│ Discharge    │
│ patient with │   │ Follow-Up    │  ╲ need to act ╱  │ regarding    │   │ patient      │
│ pending labs │   │ List         │   ◇ on        ◇   │ follow-up    │   │              │
└──────────────┘   └──────────────┘    ╲ results? ╱   │ plan         │   └──────────────┘
                                        ◇────────◇    └──────────────┘
                                            Yes
```
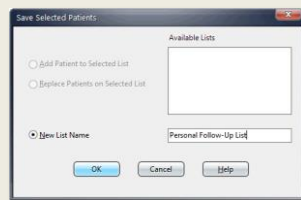
1. CREATE *a* PERSONAL FOLLOW-UP LIST

'Special lists' in SCM are easily created and maintained by individual providers. They can be used for tracking different subsets of patients; in this case the **Personal Follow-Up List** is used to track pending lab results.

1. Select your first patient to add to the list.
2. Click [Save Selected Patients...]
3. Select "New List Name" and type in the name of your list. *E.g., "Pending Lab Follow-Up."*
4. Click [OK]

Note: If a patient has already been discharged and is no longer on a clinic list, you will have to search for that patient first.

Special lists are marked with an asterisk (*) in the Current List drop-down menu.

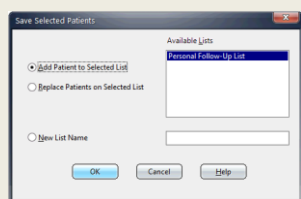## 2. ADD *a* PATIENT *to the* PERSONAL FOLLOW-UP LIST

Adding a patient to your **Personal Follow-Up List** uses the same process as creating the list in the first place.

1. Select patient(s) to add to the list (use **Ctrl** key to select multiple patients).
2. Click [Save Selected Patients...]
3. Select "Add Patient to Selected List" and select your personal follow-up list.
4. Click [OK]

Note: If a patient has already been discharged and is no longer on a clinic list, you will have to search for that patient first.

3. DECIDE *on a* TIMEFRAME *for* FOLLOW UP

A lab result might come back while you are away (e.g., you are off-service or on vacation), and it may be important that it be acted upon immediately. If this is the case, it may be a colleague of yours that will need to deal with the result (see page 4 for advice on sharing your list).

4. ANNOTATE *on the* LAB ORDER

If there is any chance a colleague might need to act on a result, add an annotation to the lab order to communicate your intentions regarding a follow-up plan. You can also add an annotation to remind yourself!

Note: Orders will appear on the **Results Tab** once the sample has been collected by Calgary Lab Services. It will show "<Result is Pending>" and you will then be able to annotate.
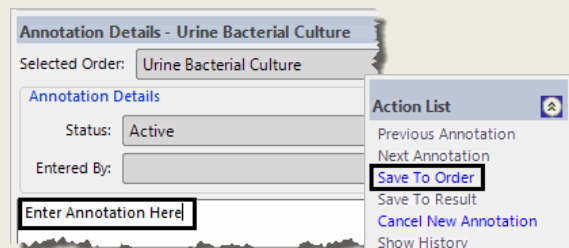
On the patient's [Results] tab:

1. Select the result name, click the icon and then click "Add to Chart…"

   or

   Right-click on the result name and select **Annotations > Add to Chart**.

2. Enter the annotation in the free text field and select "Save to Order."

Note: Ensure that the **order** is selected. An annotation cannot be saved to a result; this ensures that all annotations are available to view in one place.

MANAGING PENDING RESULTS

The list can be reviewed at any time interval. New lab results that arrived since the last time you checked your list will be flagged and easily seen here.
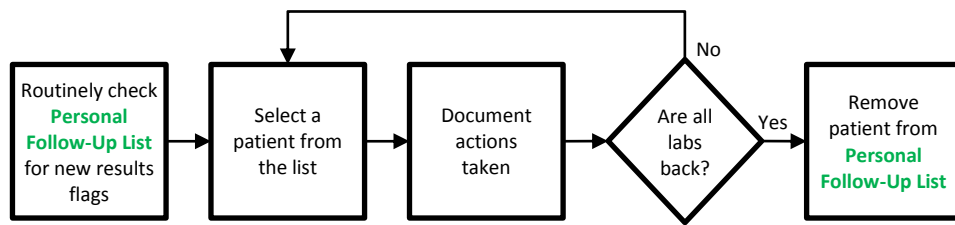
1. CHECK *your* PERSONAL FOLLOW-UP LIST

Periodically look at your **Personal Follow-Up List** to see if any flags have appeared indicating the arrival of new results. Depending on the nature of the labs ordered, you may want to check your list weekly or twice a week.
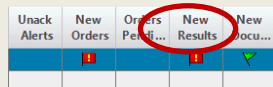
1. Select your **Personal Follow-Up List** from the **Current List** drop-down menu.
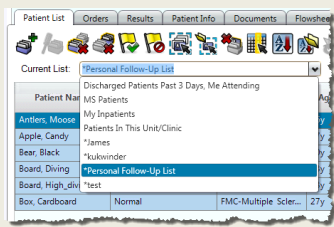
2. SELECT *a* PATIENT *and* VIEW RESULTS

You will see a flag 🚩 for a patient indicating that new results have been received since the flag was last acknowledged for this patient. An abnormal flag 🚩 will appear if a result falls outside the normal range.

1. Look for new results in the **New Results** column.

   Note: Flags need to be turned **on** for this to function properly. Click [Select All Patients] and then 🗹 to turn your flags on.

2. To review the results, double click on the flag.

   or

   From your list, click on a patient to select them and then click on the [Results] tab to view results.

   While on the Results tab, you can cycle through the patients on your list by using the two arrows at the top: ◀ ▶

Note: Not all lab tests will generate an abnormal flag, so do *not* rely on these alone to alert you to clinically significant results. For instance, Pathology, Diagnostic Imaging, Genetics and many others will *not* get flagged as abnormal.

3. CLEAR FLAGS *and/or* ANNOTATE

Make sure you clear the New Results flag(s) so that you can easily spot the results that will have arrived the next time you check your **Personal Follow-Up List**.

To clear your flags:

1. Double-click on the **New Results** flag.

2. Review the orders—previously entered orders will also appear here.

3. Click [Clear Flag]

If you need to add an annotation, instructions on how to annotate are found on Page 2.

The more diligent you are in using and clearing flags, the more useful they become.

4. REMOVE PATIENTS *from your* PERSONAL FOLLOW-UP LIST

Once all the pending lab results are back, you can now remove the patient from your list.

1. Select patient(s) to remove (use **Ctrl** key to select multiple patients).

2. Click the 🗙 icon.

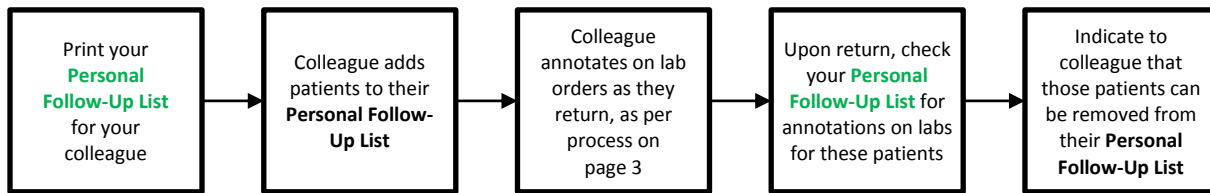## TIP: HIDE UNWANTED COLUMNS

To streamline your screen, you may want to hide extra columns and display only the information you need.

1. While on the [Patient List] tab, click the **Select Visit List Column** 🔲 icon.

2. The Patient List Column Configuration screen will appear. From here you can add, remove and reorder the columns you want displayed.

HAND-OFF *for* VACATIONS, WEEKENDS, *etc.*

At times, you may expect important results to arrive while you are away. This process can ensure continuity of care for your patients.

Print your **Personal Follow-Up List** for your colleague	→	Colleague adds patients to their **Personal Follow-Up List**	→	Colleague annotates on lab orders as they return, as per process on page 3	→	Upon return, check your **Personal Follow-Up List** for annotations on labs for these patients	→	Indicate to colleague that those patients can be removed from their **Personal Follow-Up List**

1. PRINT *your* PERSONAL FOLLOW-UP LIST

At present, there is no way to transfer your list electronically to a colleague. You will have to print a copy of your **Personal Follow-Up List** and physically hand it to the person covering for you while you are off-service.

1. Select your **Personal Follow-Up List** from the **Current List** drop-down menu.

2. Click the printer icon 🖨.

3. From the **Report Selection** window that appears, select "Patient Lists" from the **Report Category** dropdown list.

   Report Category: | Patient Lists |

4. Choose a report such as "Patient Demographic Report" or "Current Summary Patient List," then click the **Print** button.

If your colleague wishes to set up their own **Personal Follow-Up List** to which your patients can be added, these instructions can be found on the AHS website at: http://www.albertahealthservices.ca/LR3

2. REVIEW *your* LIST

When you're back on-service, you can check to see if any results have come back and any notes your colleague has left.

On a patient's **Results Tab**, once an annotation has been added, an icon 📝 will appear in the result banner. Hover over the icon to reveal the last annotation, or follow these steps to view all annotations for an order.

1. Select a patient from your **Personal Follow-Up List**.

2. Click on the Results tab.

3. Any order with the icon 📝 indicates annotations exist for that order.

   a. Select any result under that order. Right-click on the result and select **Annotations > Annotation Details** from the pop-up menu.

   or

   b. Click the 📘 icon.

In this manner, the patient will remain on *someone's* list until the results have returned and have been properly dealt with.

TIPS *for* SEARCHING LAB RESULTS

SET *the* DATE RANGE

The default view in the Results tab may not go back far enough to view results ordered a long time ago. In the Options Panel, use the dropdown QuickPick feature to set the date range to one, three or six months ago (or longer!) to display older orders.
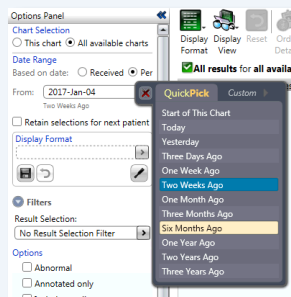
SET *the* SEARCH FILTER

Lab orders with pending results may not appear by default. Check the "Include pending" option under the filters in the Options Panel. If you previously added an annotation to a lab order, you can also filter by "Annotated only" to further narrow the results.