LAB RESULTS REVIEW & REPORTING PROJECT

PATIENTS DISCHARGED *with* LABS STILL PENDING

MANAGING LAB RESULTS USING SCM

A process for the ACH Hospitalist Pediatricians

INTRODUCTION

In a single year, there were **over 7,600 lab results** for pediatric patients that were still pending at time of discharge from ACH inpatient units. **More than 1 in 5** (21.2%) 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.

Using a few tools that already exist within SCM, the Hospital Pediatricians at ACH have developed a team-based approach for managing these patients' pending lab results so that you know when they have been completed and can act accordingly. Even if you are not overly familiar with SCM, these instructions will walk you through the process step-by-step.

WHY?

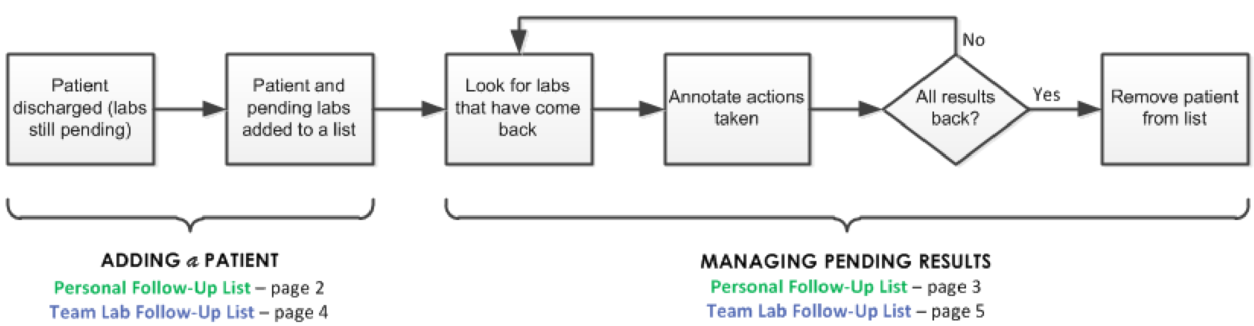
Patients who are discharged from hospital with pending lab results are at risk because clinically important results can go unnoticed (e.g., a positive screen for a bacterial infection). Discharged patients typically do not remain on a care provider's SCM Patient List, and therefore any flags for new 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.

NOT JUST LABS!

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

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

The process in its simplest form describes a reliable way to ensure you are alerted to new lab results that arrive after a patient has been discharged. There are two components: The **Personal Follow-Up List** for you to keep track while on-service, and the **Team Lab Follow-Up List** for those results not expected to come back until after you're off-service. Both are identical in terms of order of events, but the specific steps differ depending on the list.

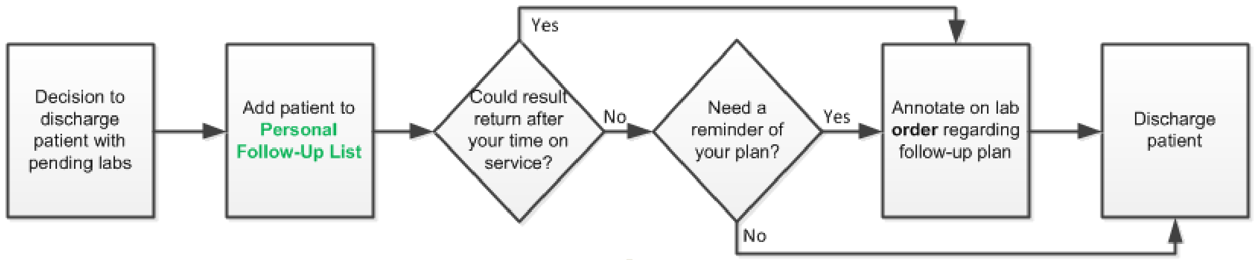


The pages that follow delve deeper into the process to show you step-by-step how to set up and manage this easy system.

- Pages 2 and 3 show you how to add patients to and manage your **Personal Follow-Up List**.
- Pages 4 through 6 show you how to add patients to and manage the **Team Lab Follow-Up List**.

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

The **Personal Follow-Up List** is meant for patients you are watching while you are still on service, or for patients you plan to follow up with even if the result comes back after your time on service. (If you have not yet created your special list, it will be created as soon as you add your first patient.)



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.

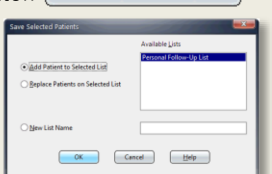
1. Select your first patient to add to the list.
2. Click the icon , or the button Save Selected Patients...
3. Select "New List Name" and type in the name of your list. *E.g., "Pending Lab Follow-Up."*
4. Click OK

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 the icon , or the button 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., while 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.

4. ANNOTATE *on the* LAB ORDER

For patients on your **Personal Follow-Up List**, annotations can make it easier for you to recall what you were planning to do when a result finally came back (e.g., fax to Dr. X, call family, no action if negative, etc.).

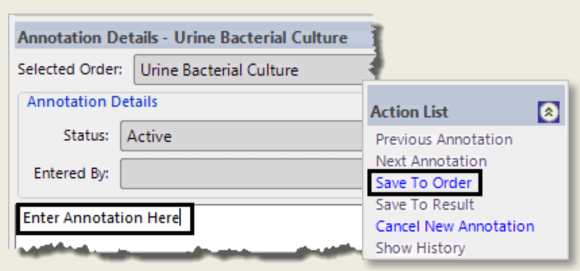
Note: Orders will appear on the **Results Tab** once the sample has been collected by Calgary Lab Services. It will show "<Result is Pending>" and you will then be able to annotate.

On the patient's Results tab:

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

or

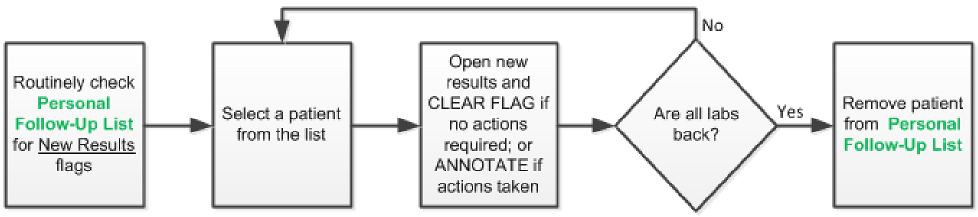
1. Right-click on the result name and select **Annotations > Add to Chart**.
2. Enter the annotation in the free text field and select "Save to Order."



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 *on your* PERSONAL LIST

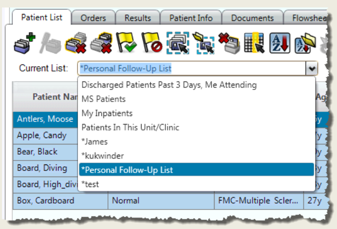
The list can be reviewed at any time interval. New lab results that arrived since the last time you checked your list will be flagged and easily seen here.



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.

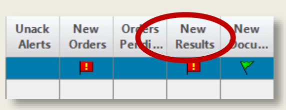
1. Select your **Personal Follow-Up List** from the **Current List** drop-down menu.



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

To manage results on your **Personal Follow-Up List**, you have a few options: You can clear New Results flags to more easily spot future the results arriving; you can add annotations; or you can review all labs on each patient once final.

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

To clear your flags:

1. Double-click on the **New Orders** flag.
2. Review the orders—previously entered orders will also appear here—and then click Clear Flag

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

Flag New On

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.

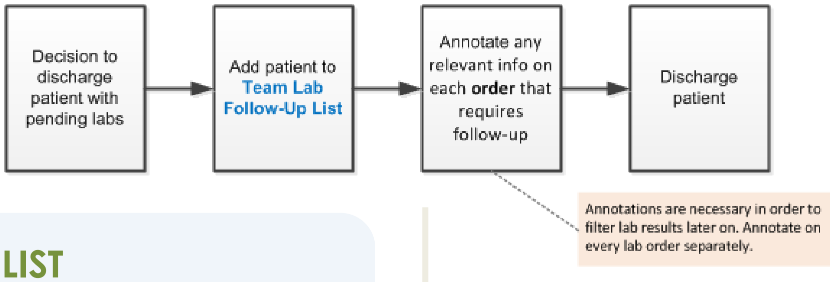
TIP: HIDE UNWANTED COLUMNS

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.

ADDING *a* PATIENT *to the* TEAM LAB FOLLOW-UP LIST

Add a patient to the **Team Lab Follow-Up List** – either at time of discharge or when you are going off-service – when you expect their pending lab tests to come back after you leave. The person assigned to checking labs will periodically look at the list and initiate follow-up with results as they come back.



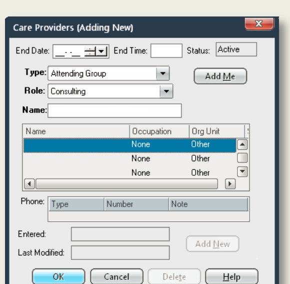
SET *up the* TEAM LIST

Before you begin, perform these steps in order to be able to view and manage the **Team Lab Follow-Up List** (you will only have to perform this once):

1. Click **New Visit List** icon.
2. Add the non-attending group as a consultant:
   - On the Providers tab, start typing "hospital…" in the **Provider Name** field and "Hospital Peds Followup Results" will appear. Select this group name.
   - From the **Role** dropdown list, select "Consulting".
   - Click Add and then OK.
3. Set the visit status:
   - On the Visit Status tab, select *both* checkbox options, and then select "Discharged" from the drop-down list.
   - Select "Date Range," then enter a range of "180 days ago" to "5 days from now."
4. Click OK.
5. Name the list "Team Lab Follow-Up List" (or something similar that you will recall later) and click OK.

1. ADD *the* PATIENT *to the* TEAM LIST

The **Team Lab Follow-Up List** is in fact a fake provider. By adding this "provider" to a patient's chart in a consulting role, you will effectively have added the patient's name to a list that anyone in the section can access.



1. Click **Add Provider** icon in the toolbar.
2. In the Care Providers window that appears, select **Type** as "Attending Group."
3. Select **Role** as "Consulting."
4. In the **Name** field, start typing "hospital…" and "Hospital Peds Followup Results" will appear. Select this group name.
5. Click OK

2. ANNOTATE *on the* LAB ORDER

Annotations serve two functions:

1. Annotations should be used to provide information to your colleague about your intended follow-up plans for a lab result (whether normal or abnormal).
2. Annotations are *necessary* in order to filter lab results later on (see page 5).

Add an annotation on every lab order separately. When possible, make sure to include clear actions for a result with sufficient detail that your colleague can act without needing to search for additional information.

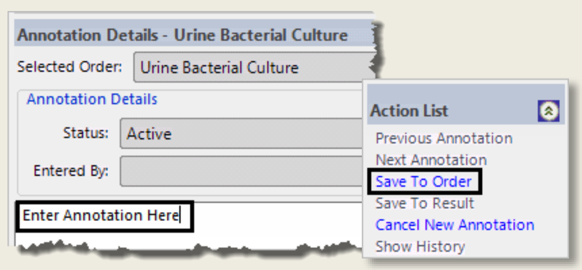
Note: Orders will appear on the **Results Tab** once the sample has been collected by Calgary Lab Services. It will show "<Result is Pending>" and you will then be able to annotate.

On the patient's Results tab:

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

   or

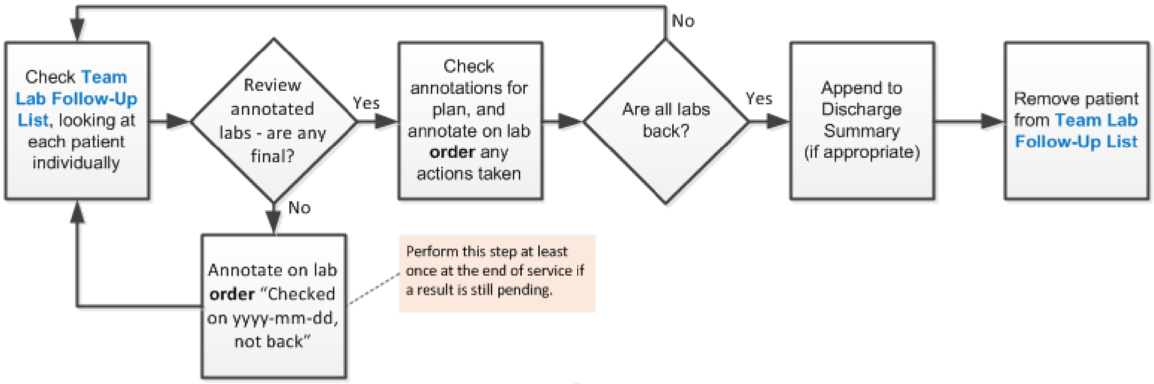
   Right-click on the result name and select **Annotations > Add to Chart**.
2. Enter the annotation in the free text field and select "Save to Order."



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 RESULTS *on the* TEAM LAB FOLLOW-UP LIST

If it is your turn to be responsible for checking the **Team Lab Follow-Up List**, use these easy step-by-step instructions to work your way through the list.



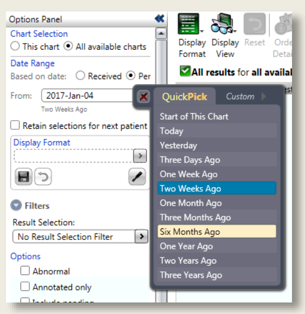
1. REVIEW *the* TEAM LAB FOLLOW-UP LIST

Every few days, you will need to check to see if new results have come back yet. Setting up the search parameters under the Results tab will help you hone in on pending results. Turning on your flags can also aid in identifying new labs.

On the patient's Results tab:

SET *the* DATE RANGE

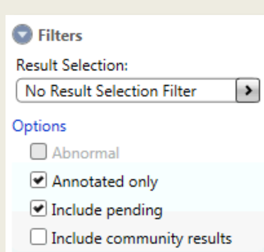
1. The default view may not go back far enough to see results ordered a long time ago. In the **Options Panel**, use the dropdown **QuickPick** feature to set the date range to one, three or six months ago (or longer!) to display older orders.



Check "Retain selections for next patient" to keep the date range from reverting back to two weeks.

SET *the* SEARCH FILTER

2. Lab orders with pending results may not appear by default.



- Check the "Include pending" option under the filters in the Options Panel.
- Also check the "Annotated only" option to further narrow the results.

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

Check all paper results that have returned, otherwise the team list will still have patients whose results have already come back.

- If it was already reported in SCM and lab checking has been finalized, sign off on the paper report.
- If it was pending and is *only* reported on paper, annotate on the SCM order that it was received by paper along with the result and any actions taken.
- If the order does not appear in SCM, leave it for the ordering physician or deal with it if critical/time sensitive and then connect with the ordering physician.

2. ANNOTATE *on the* LAB ORDER

If none of the lab results on an order are final:

✓ At least every 1 to 2 weeks, annotate on the order "*Checked on yyyy-mm-dd, not back.*" This indicates that someone has been keeping an eye out for the results.

If a result has come back:

✓ Check previous annotations for the ordering physician's plans, and add an annotation for any action taken by you.

3. APPEND *to the* DISCHARGE SUMMARY

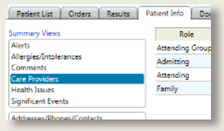
Once all results are back and annotated, append to the discharge summary when relevant. This will go to Netcare, but not directly to the community physician.

1. Select the discharge summary from the Documents tab.
2. Click on the **Append** icon .
3. Write your comments regarding labs and click Save.

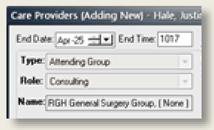
(continued next page)

4. REMOVE *the* PATIENT *from the* TEAM FOLLOW-UP LIST

The **Team Lab Follow-Up List** is acting as a provider, so you will need to remove the patient from the list by ending the consulting role.



1. Click **Patient Info** tab and select **Care Providers** in Summary Views.
2. Double-click on "Hospital Peds Follow Up Result."
3. Add an **End Date** with today's date and **End Time** with the current time.
4. Click 



Once a month, call the Lab Results Line at **403-770-3602** to go through all outstanding results (some might have come back without being caught). Provide patient names and lab results still pending—any results completed can be faxed to **403-955-3055**.

Write the date this was done on the tracking form (located in the lab area of the shared office) so that upcoming lab checkers know when a month has passed.

TIPS *for* ANNOTATIONS

- ✓ Annotate before discharge to communicate follow-up actions post-discharge. Provide information on intended care plan and what to do when the result (positive or negative) is received.
- ✓ Provide enough detailed information to let others know if definitive action was taken or if further steps are needed.
- ✓ Include directions such as "Call family," "Fax to Dr. X," "If negative, no action," etc. Also include relevant information such as "Team following up," "Patient has follow-up in X clinic in X months."