Search and Rescue: Building a Policy Management System That Works

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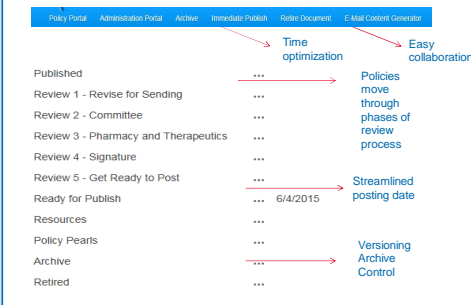**Anschutz Medical Campus, CO**

Background

- High reliability organizations ensure that everything is done the right way, every time.
- In 2013, the organization committed to establishing a system enhancing access to evidence based policies, procedures and guidelines.
- First, we created policies, procedures and guidelines that are clear, concise and evidence based
- Second, identified a need for an online system to store, manage and search for these documents allowing:
  - Search optimization by staff
  - Linking policies and attachments for immediate access
  - Updating Epic links supporting the use of the documents in the clinical care environment
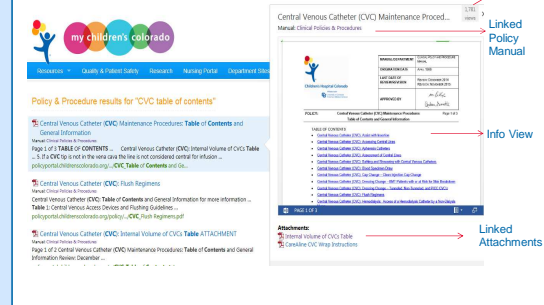- Current management systems on the market did not meet our need

Methods

- We developed the following list of requirements for a management system:
  - Navigation/Bulk Management
  - Options to use work flows
  - Streamlined Posting Process
  - Collaboration
  - Tracking
  - Versioning/Archiving
  - Reminder E-mails
  - Back Up/Down time plan
- The system developed also had to be clean, easy to use, highly searchable
- Most importantly, the system needs to allow for collaboration and not restrict access or use to only certain groups of people.
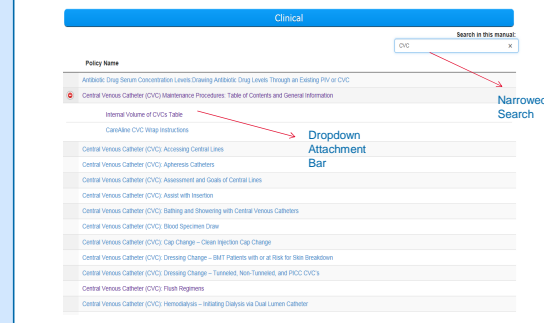

Administration / Management

Search

Metadata allows for enhanced search and links attachments with policies

Search within the Policy Manual

Implications

- Nursing established a collaborative team including IT with the goal of creating a robust policy management system based on an existing platform and requiring limited customization.
- At every point staff input, needs, and patterns of use were incorporated into the design. Updates and drafts were brought to the monthly Clinical Policy and Procedure committee for review and evaluation. Feedback was shared with the development team and incorporated into the design.

Conclusions

- Many products available from vendors are expensive, labor intensive to implement and contain elements that restrict access, decreasing interprofessional collaboration
- We found that the best system is one that is simple, fluid, dynamic and accommodates the consistent evolution of health care organizations
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