

Search and Rescue: Building a Policy Management System That Works

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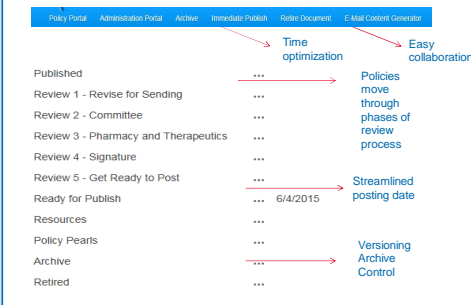
Background

- 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

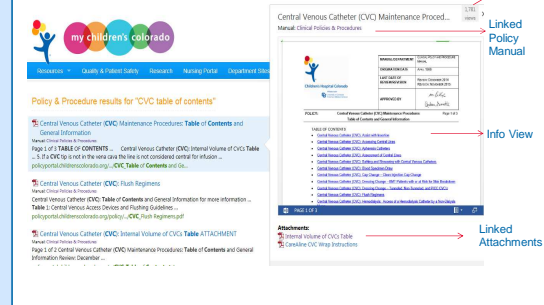
Methods

- 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



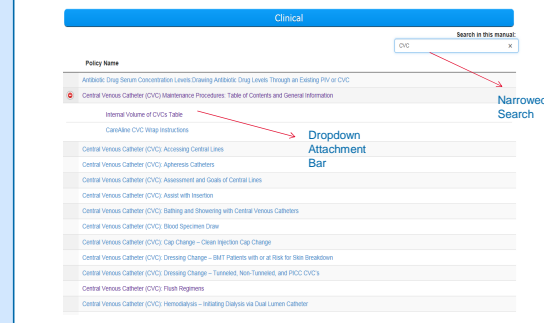
Search



Metadata allows for enhanced search and links attachments with policies

Name	Title	PolicyArea	PolicyStatus	PolicyStartDate	PolicyEndDate	PolicyDocumentType	PolicyClassification	Keywords	PolicyNumber	PolicyChildID	PolicyChildDoc
Downline_Epic Downline Procedures	Downline: Epic Procedures	Downline: Epic Procedures	Clinical	10/1/2014	4/1/2017	Policy	Organization-wide	Downline of the Centralized Documentation System/ Electronic Medical Record (EMR), not compatible with other EMR systems	Assessing Downline Report Out	Assessing Downline Reports from the EMR for Viewing and Printing	Assessing Downline Reports from the EMR for Viewing and Printing
Downline_Epic Procedures_Audit Only Process for Scheduled Epic Server Downline ATTACHMENT	Downline: Epic Procedures Audit Only Process for Scheduled Epic Server Downline ATTACHMENT	Downline: Epic Procedures Audit Only Process for Scheduled Epic Server Downline ATTACHMENT	Clinical	10/1/2014	4/1/2017	Attachment	Organization-wide	Epic Downline Procedures	Epic Procedures	Epic Procedures	Epic Procedures

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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