Interdisciplinary Care Planning: Lessons Learned on Infrastructure, Culture and Practice

Statement of Problem

- Opportunity for re-working the evidence-based Interdisciplinary Plans of Care (IPOCs) in the enterprise electronic health record to:
  - Infuse integrated documentation
  - Support multidisciplinary care team collaboration (change culture)
  - Create guidelines for use
  - Implement education
  - Promote interdisciplinary care team use as a tool to collaborate during patient and family centered care planning
Objectives

1. Create an infrastructure for designing IPOC content
2. Establish a culture of interdisciplinary care team interaction
3. Design evidence-based content for patient and family centered care planning

IPOC Timeline

Phase 1
Go-Live 2012
Problem & Condition Focus

Phase 2
Go-Live 2015
New infrastructure
Behavioral Health
Critical Care Transplant

Maintenance
Ongoing updates to content and evidence
Facilitate integrated documentation
Methods

- Clinical Content Knowledge Management team (CCKM)
- A project plan was developed for the infrastructure & guideline development, design, build, testing and implementation of 40 new IPOCs
- The scope of the project included implementation in seven acute care hospitals in a regional health system

Infrastructure and Guideline Development

- Literature review was completed via internet search using the key words “interdisciplinary plan of care” and “care plans”
- Feedback collected from end users and care team members during a series of shadow days covering a variety of patient care units
- EHR vendor Post Conversion Assessment (PCA) recommendations
- Full-day multidisciplinary meeting to review findings, make final recommendation
- Recommendation endorsed by the nurse executive sponsoring the IPOC project
Literature Review


Contributing Concepts

- Patient and Family Centered Care
- Evidence-Based Care and Beyond
- IPOC Philosophy
- Goal-Oriented Outcome Planning
Seven IPOC User Guidelines

1. A patient’s **plan of care** includes many components of their electronic health record.
2. Provider orders are not included in IPOCs.
3. IPOC assumes a competent, experienced clinician end user.
4. Licensed Practitioner Standards and Scope of Practice are expected basic care, and are not included in IPOCs.
5. When using an IPOC, the care team should consider the question, “*What is keeping this patient from progressing to an improved health status?*”
6. The IPOC is reviewed, updated or expanded on a regular basis to reflect a holistic view of current status, needs and problems specific to the patient.
7. Goals and interventions should only be initiated if applicable for the patient, and can be modified during the patient’s stay.

Design

- CCKM team cross-walked the evidence based starter content with existing EHR documentation.
  - If the documentation existed, it was noted in the starter content in order to avoid duplicate documentation and promote integrated documentation.
  - If the content did not exist, it was identified for subject matter expert (SME) and enterprise workgroup vetting.
Design

- Subject Matter Expert (SME) design sessions
  - Consensus on standards for documentation
  - Applied clinical workflow expertise
  - Discussed and approved all content
- If the documentation already existed in the EHR, SMEs approved or updated the crosswalk based on actual clinical workflow
- If the content was new, SMEs approved it or removed it based on clinical expertise and standards of practice

Design

- New documentation components to be added to the EHR from SME design sessions vetted with the enterprise workgroup, which is a collaboration of many disciplines.
- IPOC Analyst and EHR vendor review
  - Crosswalk and content from the design sessions
  - Confirm the location of the documentation in the system
  - Identified new content requests
Build/Test

- **Validation Testing**
  - IPOC Analyst and EHR vendor collaborated to build and complete validation testing on the new IPOCs.
  - Validation testing included point functionality and documentation of results.
  - This phase lasted about eight weeks.

Build/Test

- **Clinical Functional Testing**
  - Important to close the loop for our SMEs and include them in the second phase of testing.
  - SMEs from the design sessions were brought together to complete clinical functional testing of all of the IPOCs.
  - Reviewed the content for clinical relevance, workflow and evidence based practice.
  - Given a clinical scenario to complete testing and provide an interactive experience.
Implementation

- All hospitals were given communication packets containing staff and hospital-wide notifications.
  - Notify all care team members about the new content,
  - Provide high level education about IPOCs
  - Encourage managers to assign the new course to their staff

- An interactive education module was developed to compliment the new content and updated functionality of IPOCs
  - Module 1 - Introduction
    - Objectives:
      - Define the purpose of Interdisciplinary Plans of Care
      - Introduce the guidelines for using an Interdisciplinary Plan of Care
      - Review a list of the available Interdisciplinary Plans of Care
      - Identify documentation components that make up an Interdisciplinary Plan of Care
  - Module 2 - Using Interdisciplinary Plans of Care
    - Objectives:
      - Define the statuses of an IPOC
      - Identify two methods of including an IPOC in the patient’s plan of care
      - Review how to make an IPOC patient-specific
      - Practice documenting in an IPOC
      - Identify when to discontinue an IPOC
  - Module 3 – Interdisciplinary Plans of Care Tips and Frequently Asked Questions
    - Objectives:
      - Provide tips for using IPOCs
      - Answer FAQs
      - Demonstrate reporting for IPOCs
      - Describe the process for requesting a change to an IPOC
      - Provide resources for assistance
Implementation

- **Go-live**
  - Remote command center available for any issues
  - Last minute validation testing in the live environment
- **The go live was successful and without any issues!**

Evaluation

- **Mock Joint Commission Survey focused on IPOCs**

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<thead>
<tr>
<th>Interdisciplinary Plan of Care Post Implementation Survey</th>
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<tbody>
<tr>
<td>Clinical Content Knowledge Management</td>
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<td>April 2015</td>
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<table>
<thead>
<tr>
<th>General Use</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree nor Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
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<tbody>
<tr>
<td>IPOCs are a good tool for interdisciplinary care planning.</td>
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<td>Typically review the IPOCs for my patient during interdisciplinary rounds.</td>
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<td>Typically document in the IPOCs for my patient once a shift.</td>
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<td>Don't use IPOCs because they are too much extra work.</td>
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<td>IPOCs make me double document.</td>
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<td>Understand the guidelines for using IPOCs.</td>
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Results/Lessons Learned

- Set of guidelines for using IPOCs as a tool for care planning in the EHR.
- Culture was impacted by the participation of SMEs in the design and testing of the content by creating IPOC champions at each of the hospitals.
- IPOC education became available and part of the care team education goals.
- A new infrastructure developed to address patient and family centered care planning, duplicate documentation and interdisciplinary collaboration.
  - Unintended Benefit! System constraints were identified and steps will be taken to further optimize care planning in an electronic record environment.

Significance/Lessons Learned

- Potential to improve health care and patient and family outcomes
  - IPOCs are a tool for patient and family centered care
  - Method of engaging patient and their families
- By incorporating evidence based practice into care planning and collaboration tools for the interdisciplinary team, we have provided a new level of enterprise resources for supporting better outcomes for our patients.
- Contributed to informatics practice by developing new ways to streamline documentation for the care team.
- Uncovered system constraints and motivated our EHR vendor to evaluate ideas for improvement in functionality.
Thank You!

Questions?

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