

Standardizing Interprofessional Patient Education Documentation

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Introduction and Background

Patient Education in a pediatric setting can be complex, and is usually multidisciplinary. It is necessary during all aspects of a patient encounter and often has regulatory requirements. Patient education is provided and documented by clinicians including nurses, physicians, coordinators, and pharmacists. Transplant education is a highly regulated aspect of Pediatric Transplant care, and is assessed by the Centers for Medicare and Medicaid Services (CMS). Within our institution, the transplant population includes: heart, liver, kidney, lung, multivisceral, and bone marrow transplant. Patients can be seen on three inpatient units, plus the intensive care units. The number of clinicians that interact with the patients and provide education is enormous, and education can be provided along any aspect of the continuum of care.

At our institution, documentation varied slightly amongst the three inpatient transplant units, Cardiology, Surgical, and Bone Marrow. The units had designed paper grids to track the details of education, the dates of the education, as well as notes about when the education may need to be reinforced or repeated for different caregivers. The nursing staff often had to access previous admission education information for the patient, but sometimes the document was not accessible, even in the scanned documents section of the electronic health record. Identifying a need for a more standardized approach to this highly regulated practice of documenting education, the Nursing Director of Transplant, as well as some of the transplant specialty nurses inquired about creating a way to document the transplant education. The reason that the current education documentation was not working for this group was because the historical recall of the education was not optimal.

Methods

A group was convened involving clinical experts, an Application Specialist and Informatics Nurse Specialists to identify and brainstorm a new way to document the transplant education. The Application Specialist was familiar with ultra-grids, and worked with the team to build this method for documentation. An Ultra-grid is a tabular format that can be inserted into a form which provides consistent topics and standardized documentation options for all clinicians. The process of identifying education statements that could be standard amongst the diverse transplant groups presented a challenge. Collaboration led to implementation of consistent regulatory driven language, which supported best practice.

Results

Successful implementation was evidenced by anecdotal feedback from users. The change from a paper form to electronic method decreased the incidence of misplaced documentation. Clinicians reported that information was easy to document and transparent to the interprofessional team. This documentation was also reported to aid in smooth transitions of care because it was clear what had been taught and what education still remained. The transplant teams also reported that education documentation was accessible during a regulatory survey.

Discussion

The benefits of this new education documentation include the ability for multiple contributors to document in a standard way; easy accessibility to both document and retrieve information; and the feasibility of recall for regulatory purposes. The transplant education grid project became the framework for all education documentation throughout the electronic documentation system.

References

1. Barthold, M. (2009). Standardizing electronic nursing documentation. *Nursing Management*, 40(5), 15-17.