



# Improving Pre-Admission Testing (PAT) through Informatics Enhancement

**Team Leader:** Regina Kozak BSN, RN, CAPA, CNIV

**Co-Investigators:** Siobhan O'Neill BSN, RN; Andrea Frank RN;

Theresa Bress BSN, RN; Rick Howard MD; Jung Lee MD;

Helen Leek, VP Physicians Operations, MFP; Mary Beth Coyne, Sr. Director Operations;

Hillary Stamps BSN, RN, CPAN; Kristy O'Neill MSN, RN, CPAN

**EMR System Analysts:** Cheri Chandler; Shelley Rooney

Mercy Medical Center – Baltimore, Maryland



## Introduction

At Mercy Medical Center (MMC) the Pre-Admission Testing (PAT) Department ensures diagnostic documents (DD), required by Anesthesia, are in the virtual chart by day of surgery (DOS) to facilitate the perioperative process. Missing DD can lead to Operating Room (OR) case cancellations on the DOS due to the missing DD and related medical concerns. DOS cancellations are problematic for the patient and the organization.

## Identification of Problem

- ❑ Project Dates:  
September, 2018 – February, 2021.
- ❑ Problem: Following the implementation of an Electronic Medical Record (EMR) in the fall of 2018, the PAT staff recognized difficulties locating the DD in the patient's EMR.
- ❑ Findings: These difficulties resulted in elevated DOS cancellation rates, due to medical reasons, reaching a high of 1.6% in September, 2018.
- ❑ Purpose: A need for EMR Enhancement was identified along with a focused collaboration with the Surgical Team.

## QI Question/Study Goal

- ❑ Question: Does collaboration with EMR analysts and leadership improve availability of DD within the EMR and increase the efficacy of PAT staff to complete pre-surgical charts resulting in a decrease of case cancellations on DOS?
- ❑ Goal: To improve the integration process of DD in the EMR, reducing DOS cancellations due to medical reasons to less than 1.6% within 1 year.

## Methods

- ❑ Build appropriate tasks in PAT EMR Module (Procedure Pass) so proper DD will link with correct task.
- ❑ Monthly meetings were held with the EMR analysts.
- ❑ Surgical services and ambulatory care leadership participated in additional monthly meetings.
- ❑ Regular meetings were held with Anesthesia.
- ❑ Continual review of EMR with nursing leadership and PAT staff members.

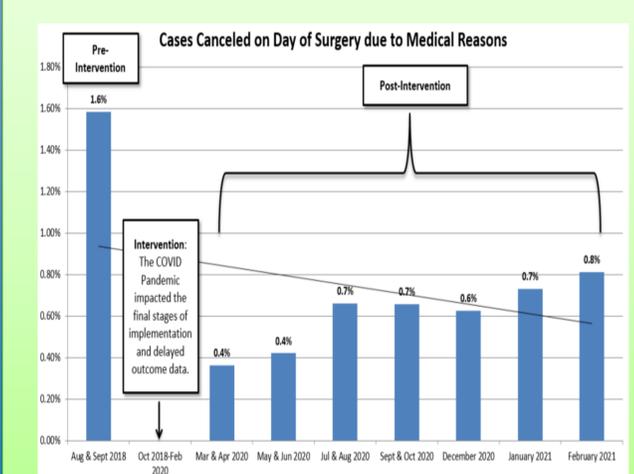
## Discussion

- ❑ Collaboration with PAT staff, Specialty Offices, and leadership took place February to July, 2019. PAT staff also met with the EMR Analysts to enhance the EMR.
- ❑ The changes made to the EMR workflow for scanning DD were implemented.
- ❑ Improved compliance helps ensure a safe surgical process and preparedness for surgery thereby decreasing DOS cancellations due to medical reasons.

## Outcomes/Results

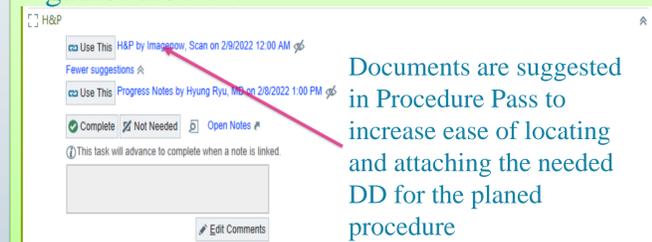
- ❑ In September, 2020 the DOS cancellations due to medical reasons reached 0.7%.
- ❑ The COVID Pandemic impacted the final stages of implementation and delayed outcome data.
- ❑ In February, 2021 DOS cancellations due to medical reasons remained at a decreased level of less than 0.8%.

## Results Data



## Procedure Pass Activity

MMC's EMR for PAT offers an activity called Procedure Pass. Procedure Pass provides nurses with a virtual location to gather the DD.



Documents are suggested in Procedure Pass to increase ease of locating and attaching the needed DD for the planned procedure

## Conclusion

Collaboration with PAT staff, EMR Analysts, Surgical Services, Anesthesia providers, and leadership is key to ensuring the required DD are present in the EMR to decrease the rate of DOS cancellations due to medical reasons.

## Implications for Perianesthesia Nurses & Future Research

Continuous monitoring, evaluation, and collaboration with the entire team are essential to consistently improve patient safety and preparedness for the DOS.

**Future Plan:**

- ❑ Will continue to monitor DOS cancellations due to medical reasons to ensure the rates do not increase.
- ❑ Continue to work collaboratively with EMR Analysts, surgical services, Anesthesia providers, and leadership to ensure required DD for DOS are available.