



North York
Family Health Team

Optimizing Quality of EMR Data to Improve Care: Leading the Human Side of Change

North York Family Health Team

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Disclaimer

Relationships with commercial interests:

- We have no actual or potential conflict of interest in relation to this work.

Affiliation / Financial interest:

- We do not receive financial support from any organization with respect to this work.



Agenda

- Objective
- Background
- Change Management Principles
- NYFHT Experience
- Critical Success Factors



Objective

The aim of this presentation is

- to describe change management principles
- share successful change management strategies NYFHT has used to improve Electronic Medical Record (EMR) data quality



Background

- EMR Data:

- Data is the cornerstone of quality improvement (QI)
- Standardized clinical data play an important role in measuring and monitoring the quality of healthcare delivery
- Data in Electronic Medical Records (EMRs) are often not standardized
- Reports generated from EMR systems are not reliable

What to do about it:

- change and improve EMR data entry habits
- ensure clinicians support data optimization efforts





Background (cont'd)

Studies Indicate:

- the challenge of persuading individuals and groups to change their behaviour
(Lorenzi & Riley, 2000, Golden, 2006)

- Effective change management strategies increase the likelihood of success (Kotter, 1996)



Change Management

➤ Definition:

An approach to transitioning individuals, teams, and organizations to a desired future state

Up to 70% OF ALL CHANGE EFFORTS FAIL

Kotter, J.P. (2008) A sense of urgency. Boston: Harvard Business School Press.

Why?

- Organizations often do not take the holistic approach required to see the change through





Setting

North York Family Health Team

- 71 physicians
- 42 plus Allied Health Professionals
- 220 plus EMR users (including office staff)

- 2 EMRs
- 5 servers, 5 databases
- 17 sites

- **Over 69,000 Rostered patients**



Where We Started

- **Individual** cases of Excellent Care in some practices
BUT:
Nearly every physician had **their own way** of entering data and doing things
 - No consistent reminders or alerts across many offices
 - Very difficult to build disease registries (example, diabetes)
 - Cannot produce accurate reports
- Allied Health Providers had to learn **different** ways of **doing the same thing**
 - Difficult to plan consistent programs or implement consistent approaches to care



Moving Our Organization Ahead

“Kotters Eight Steps of Change”



■ Kotter, John P. and Cohen, Dan S. The Heart of Change. Boston: Harvard Business School Press



1- Establish a Sense of Urgency

- Help others feel a strong sense of determination to move and win, *now*
 - Help others see the need for change
 - Emphasize the importance of acting now
 - Get buy-in
- “We don’t know who **smokes!**”
- “We don’t know who our **patients with diabetes** are, and how can we improve their care?”





Actions NYFHT Has Taken

- Selected physician champions and opinion leaders within the team
- Set up an data optimization plan and long-term-goals
- Explored opportunities, roadblocks and benefits to the NYFHT
- Formed data optimization committee (IT/IM Committee)
- Requested support from leadership: ED/MD
- Developed data management strategies and methodology



2- Form a Guiding Coalition

- Form a team with enough power to lead the change
 - Convince others that change is needed
 - Form a team of like-minded thinkers
 - Continue to build urgency around the need for change





Actions NYFHT Has Taken

- Obtained consensus from the committee and designated physician champions
- Examined existing FHT policies and procedures and developed new policies to support data optimization
- Develop an internal communication plan within the FHT
- Began data management by developing a plan within the FHT





3- Create a Vision

- Clarify how the future will be different from the past
 - Create a vision that clearly explains the desired future state and its impact
 - Be clear why you're asking people to make the behavior change
 - Create strategies that delivers the vision





Actions NYFHT Has Taken

- NYFHT Vision: provide **better care** and improve **outcomes** for NYFHT patients

Better data = better care

- Created strategies that delivers the vision: data entry clerks; education on consistent data entry
- Demonstrated the change through champions and opinion leaders



4-Communicate the Vision

- Ensure that people understand and accept the vision
 - communicate the vision using any existing communication channels and opportunities
 - email communications
 - group meetings
 - informal meetings
 - posters





Actions NYFHT Has Taken

- Emails
 - Communicated decisions, project details and results related to data optimization activities via email with physicians and staff (individual and organization level)
- All FHT meeting
 - Communicated the vision, the importance of data optimization and results of quality improvement and research activities in face-to-face semi-annually
- Newsletters
 - Used NYFHT newsletters to communicate important data related announcements



5-Empower Others to Act

- Remove as many barriers as possible and allow people to do their best work
 - Address concerns and identify obstacles
 - individuals resistant to change
 - organizational structures
 - organizational systems
 - Take action to remove obstacles
 - Encourage risk taking and non-traditional ideas, activities, and actions
Example: having Summer students enter data in EMRs
 - Recognize and reward people who are striving for change





Actions NYFHT Has Taken

- Training sessions
 - EMR educational sessions
 - Trained new staff and physicians joining the FHT
- Tools
 - Developed user guides and Manuals
 - Made them available on NYFHT Web portal and Dropbox
- Quality Improvement
 - Staff education and training





6- Create Short-time Wins

- Actively plan and achieve some short-term gains
 - Look for achievable short-term wins
 - Start small
 - Develop a plan to make short-term wins
 - short term goals within the long-term change project
 - Reward those who help meet the targets
 - Communicate internally about organizational achievements





Actions NYFHT Has Taken

- Communicated the successful completion of all data management efforts with the NYFHT physicians and employees in team meetings, in FHT newsletters and via emails
- Presented data optimization and quality improvement projects successes at conferences/workshops





7- Keep the Momentum for Change

- Consolidate gains and produce more change
 - Build on the momentum to make the vision a reality by keeping urgency up
 - Tell vivid stories about the new organization, what it does, and why it succeeds
 - Develop a process improvement strategy



Actions NYFHT Has Taken

For this year's "summer student program":

- **Standardized data entry and coding is being maintained across NYFHT.**
 - Codes were added for: atrial fib, osteoporosis, Crohns, Ulcerative colitis, breast CA, colorectal CA, and Ovarian CA
 - We now have reasonable registries for **9 conditions and 3 cancers**
 - We mailed **1,731 roster invitation letters** and **294 letters to patients overdue for their diabetes visits**
- We **restructured free text for tobacco use** into categories: current smoker, ex-smoker, and never smoked
- We **verified and updated preventive services**, using chart audits and the Cancer Care Ontario Screening Activity Report (SAR)





8-Institutionalize & Sustain Change

- Anchor new approaches in the culture for sustained change
 - Ensure that leaders continue their support
 - Incorporate the behavior change in any new employee onboarding





Actions NYFHT Has Taken

- Vision for data optimization has become part of daily operations within the NYFHT
- New physicians and/or AHPs receive training on EMR data standardization and the importance of consistent data entry (use of templates and stamps)
- Using email, how the new data approaches, behaviors, and attitudes have improved healthcare performance in the offices is periodically communicated within the FHT.



NYFHT Success Factors

- Create urgency by communicating the risks and benefits of standardizing data entry
- Build a group of strong and supportive leaders who help drive the change; use physicians or AHP champions to promote the behaviour
- Create a vision to let people know about where the Family Health Team is heading and help them understand why coding is important
- Involve healthcare providers in making decisions about what to code
- Start small and prioritize the conditions that need to be coded first
- Get agreement on those selected conditions
- Communicate the change and celebrate the small successes
- Report cumulative success to all those involved
- Explain and teach the new processes and data entry methods to all new employees through training sessions and use of data manuals





*“It is not the strongest of species that survives,
nor the most intelligent but the one most
responsive to change.”*

– Charles Darwin



Reference

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Thank You

Questions?



North York Family Health Team

Our Vision

"Enhance primary healthcare, interdisciplinary learning, and clinical research to improve the health of North York Family Health Team's diverse patient population."

Our Mission

"To provide accessible, patient-focused, and family-centred primary healthcare through an interdisciplinary team committed to transforming health knowledge into best practices."

Our Values

"Patient and family centred care - Teamwork – Continuous Learning – Communication"

Visit us at www.nyfht.com