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# Electronic Health Survey Devices

## in a Primary Care Practice Setting

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Patient Safety Fellowship



# The Team



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# The Team

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*“People aren’t necessarily slow in adapting to technology;  
technology is often slow in adapting to people.”*

(Nova Scotia Center on Aging, 2001)

# Business Case

- Patients are not using the electronic health survey device
  - This is an issue because these devices improve efficiency  
(Business Wire, 2007)
- The electronic health survey device is not being offered to all patients
  - In our experience, the device is offered to patients less than 50% of the time (on average)



# Business Case

- Older adults are often capable and willing to use technology, though they may express greater frustration with new technology (Marketing Vox, 2008)
- Older adults do well with one-on-one technology assistance (Associated Content, 2007)



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# Proposed Goals

- To increase the number of patients using the electronic health survey device by 15% in the next six months
- To offer the electronic health survey device to 100% patients within the next two weeks

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# The Observation Process

- Each team member visited the Internal Medicine practice alone/with teammates on different days of the week and at different times of the day
- While there, the teams spoke with different stakeholders, including the Practice Manager, the Clinical Manager, the principal investigator of a clinical trial involving the device, receptionists and patients

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# The Observation Process

- Gathered information regarding how often the device was offered and used, noting the demographics of the patients
- Observed from different locations at the practice, including the main waiting room and both of the smaller pod waiting areas

# Current Condition – Check-in

First, the patient arrives at the reception desk



The patient is then offered either the device or paper forms to check-in

# Current Condition – Check-in



The patient then proceeds down a hallway to the appropriate waiting pod

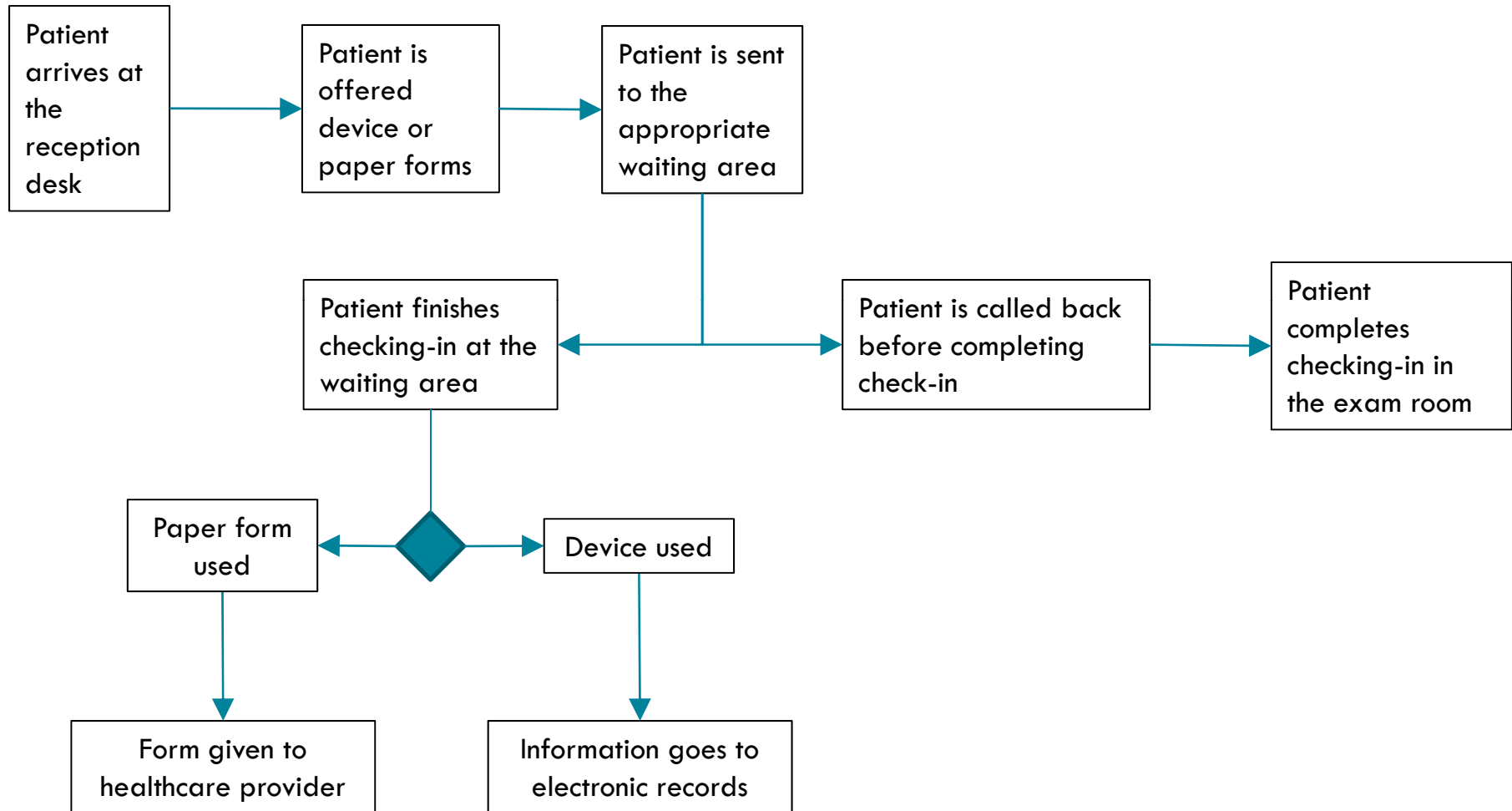


Pod A



Pod B

# Current Condition – Check-in



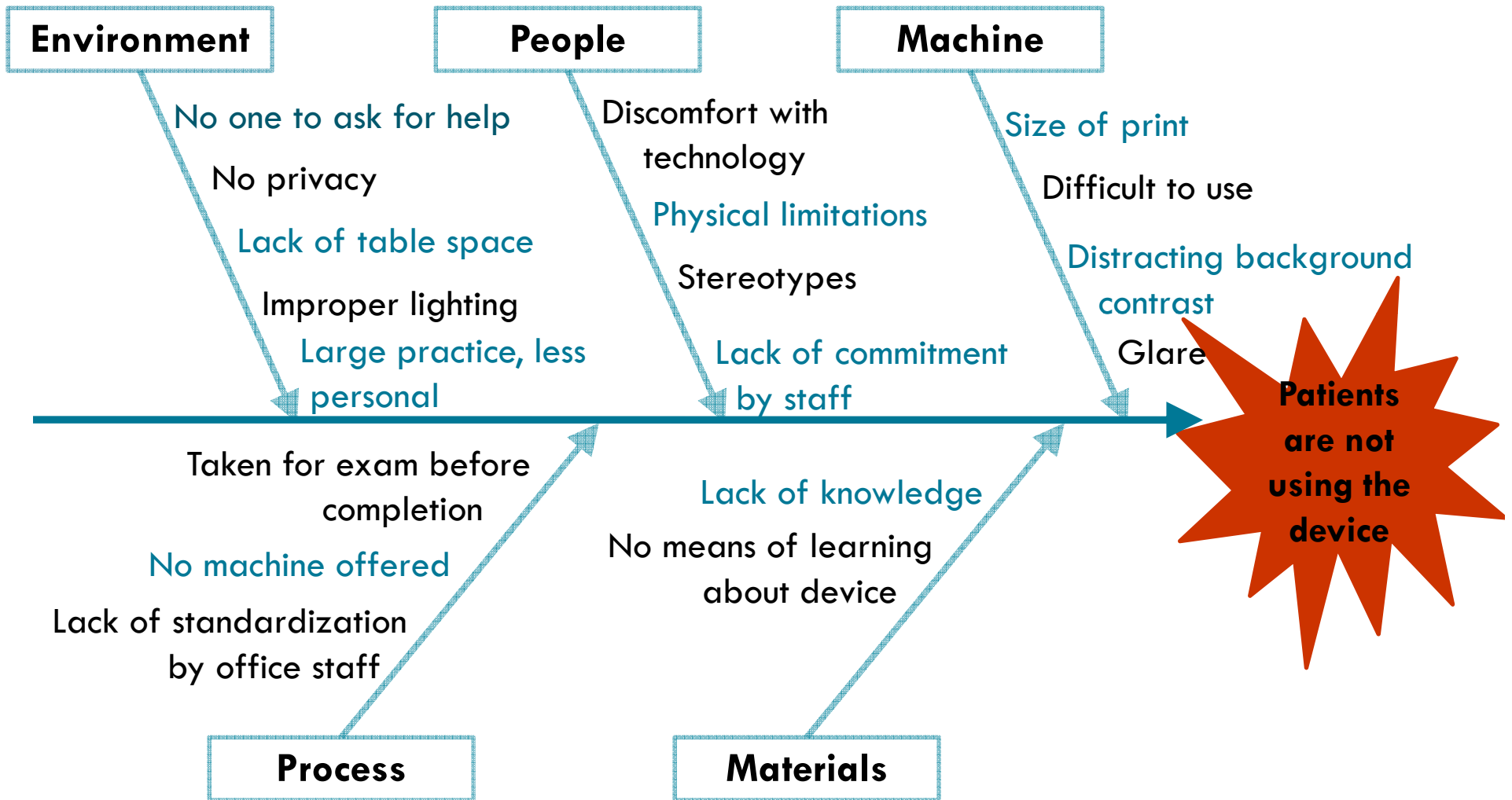
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# Current Condition – Patient Quotes

*“I am too old for this kind of stuff.”*

*“This is supposed to save time, but I am sitting here waiting for it to print out before I see the doctor.”*

# Current Condition – Cause and Effect



# Opportunities for Improvement

- Offer device to 100% of the patients
- Offer ONLY the device
  - Provide paper form upon request
- Make education about device readily available
- Encourage employee buy-in with education about benefits of device
- Eliminate waste by standardizing the process of offering the device

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# Recommendations

## ■ Support for the patients

- Create a private area where first-time users of the device will feel comfortable asking questions
- Require a staff member to check-in with the new user within five minutes of his or her receiving the device
- If the user experiences difficulty, the staff member should assist with consideration to the patient's privacy
- Have older technology-savvy staff members or volunteers assist older adults with the device

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# Recommendations

## ■ Staff training

- Provide training on the use of the device
- Provide training on the benefits of the device, specifically those that relate to the employee and the office

## ■ Standardization of the process

- Require the check-in desk attendants to offer the device to every patient, every time

- Exception

- Only when the attendant has specific knowledge that the patient will refuse to use the device, he or she should offer the paper form

# Target Condition

- Offering the device to 100% of the patients
  - Offer the device first
    - (Unless there is specific knowledge of the patient's inability or explicit unwillingness to use the device)
    - If the patient is unable to use the device on a visit, he or she will be provided the option of being exempt from use of the device on future visits. The information is to be noted and made available to the desk attendant.
    - If the patient has refused to use the device within the previous 48 hours and the employee is aware of this, the employee is not required to offer the device to the patient.

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# Plan for Proposed Experiment

- Training should be provided to all staff regarding
  - The importance of every patient using the device
  - The ability of older adults to receive education about using the device
  - The importance of one-on-one interaction when teaching older adults about how to use new technology

# Plan for Proposed Experiment

- Every receptionist will offer the device to every patient 100% of the time
  - Observations of the main reception area should be conducted for 10 days, noting the device's acceptance rate by the patients
  - A private area will be designated for one-on-one help
  - Information about the device and its benefits will be made available to patients through signs and brochures

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# Learning from the Fellowship

- The benefit of diverse backgrounds

- The multidisciplinary nature of the group was very helpful in gathering ideas from people with different backgrounds

- Problem-solving

- The techniques and tools learned during the Fellowship assisted in solving problems in the 'real-life' settings

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# Learning through Observation

- Essential to observe the situation first hand
- Helpful to observe the process in the natural environment
- Observing as ‘outsiders’ provide a unique point of view, highlighting problems that might otherwise go unnoticed
- Helpful to discuss the problem with a variety of stakeholders when preparing the business case