Presenters

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Agenda

1. Learning Objectives

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5. Results and Findings

6. Follow Up

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Learning Objectives

1. Define scope of specimen management during perioperative encounter.

2. Identify challenges and barriers to efficient specimen handling and processing.

3. List strategies used to improve specimen management for clinical team members.

4. Describe quality improvement reporting used to monitor specimen management.

Intraoperative Specimen Management - Background

➢ Intraoperative Specimen Management involves:

Collection	Test ordering
Labeling	Proper Containment & Storage
Tracking	Transporting
Lab Processing	Quality monitoring/reporting

➢ Gathered feedback from staff, lab personnel, and safety event reporting to identify challenges and opportunities for improvement:

➢ Revealed Electronic health record limitations for documentation, ordering & label printing

➢ Identified Education gaps

➢ Highlighted Inefficiencies with tracking & following up on expected vs received specimens

➢ Created Workflow maps to define steps for specimen handling for each hospital and identify gaps and lack of standardization between departments and facilities

Intraoperative Specimen Management - Methods

➢ SBAR was created by our Operating Room Leaders – defining the scope of the project including challenges and recommendations

➢ Multidisciplinary Project team included:

OR leadership	Project Manager
Lab Leadership	Clinical Informatics
Clinical Users	Lab/OR application Analyst
IS Leadership	Clinical Education
EHR technical Support	Informatic Education Specialist

➢ Collaborated with IS and operational leaders at a like size facility to gather information on EHR settings and workflows

➢ Access to specimen sources/types/tests needed involved multilayer settings within the lab and perioperative EHR applications

    ➢ Required lab leader and laboratory provider guidance for appropriate mapping

➢ Provide access to perioperative team to lab tracking activity to maintain chain of custody from collection to results

➢ Enhance reports available to OR leadership to monitor daily specimen management

Intraoperative Specimen Management - Challenges

➤ Knowledge gaps between perioperative and lab team members understanding of the individual processes across disciplines

➤ Coordinating multi level setting changes needed between Lab and Periop applications

➤ Aligning hardware settings on printers and labels to meet Periop and lab regulatory requirements

➤ Creating adaptable solutions that met needs of large medical center, small community hospitals and ambulatory surgery center

➤ Streamlining specimen management for multiple testing and resulting agencies

➤ Balancing competing priorities to ensure continuous progress and effective collaboration
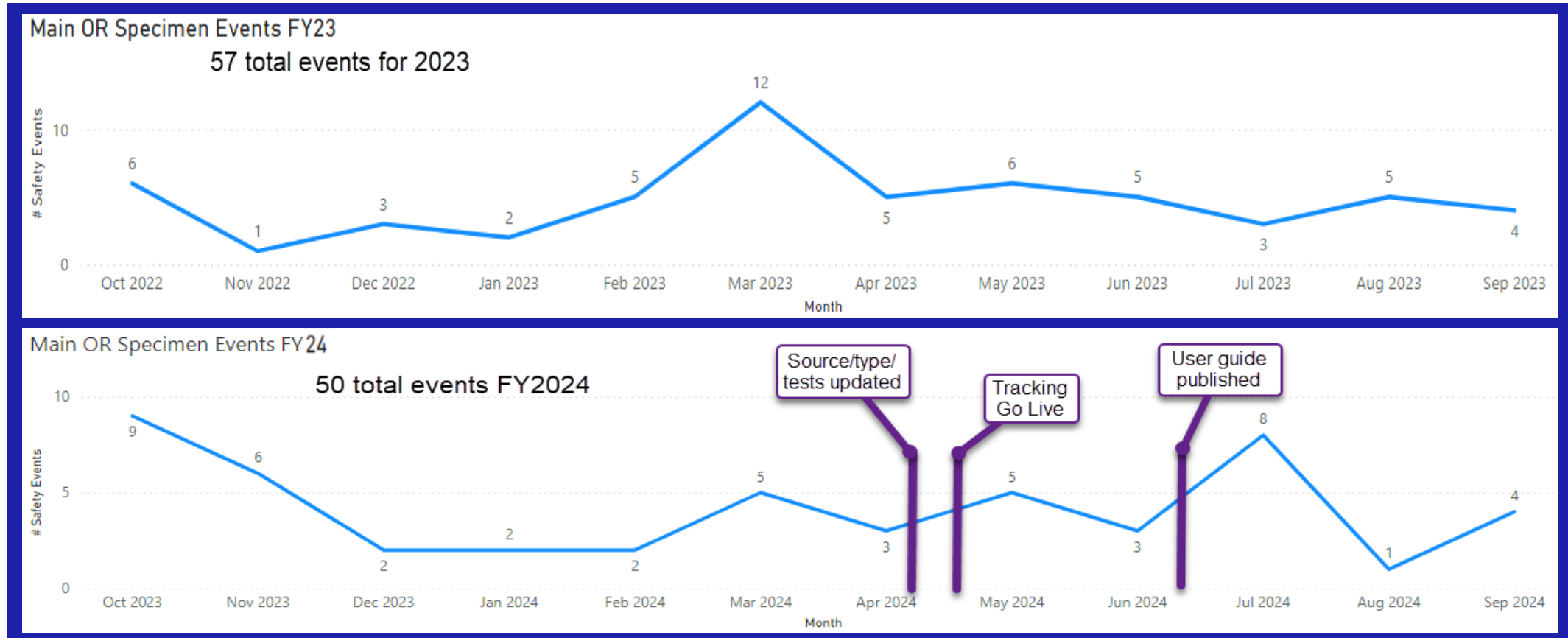
Intraoperative Specimen Management – Results/Findings

➢ Trained over 200 periop staff on workflow changes through written materials, verbal instructions, live demos, group presentations, and personalized one-on-one sessions

➢ Created a comprehensive Perioperative Specimen Resource User Guide

➢ Educated intraoperative staff on using orders process outside of normal perioperative workflow when necessary

➢ Established a process for submitting future changes

Intraoperative Specimen Management – Results/Findings

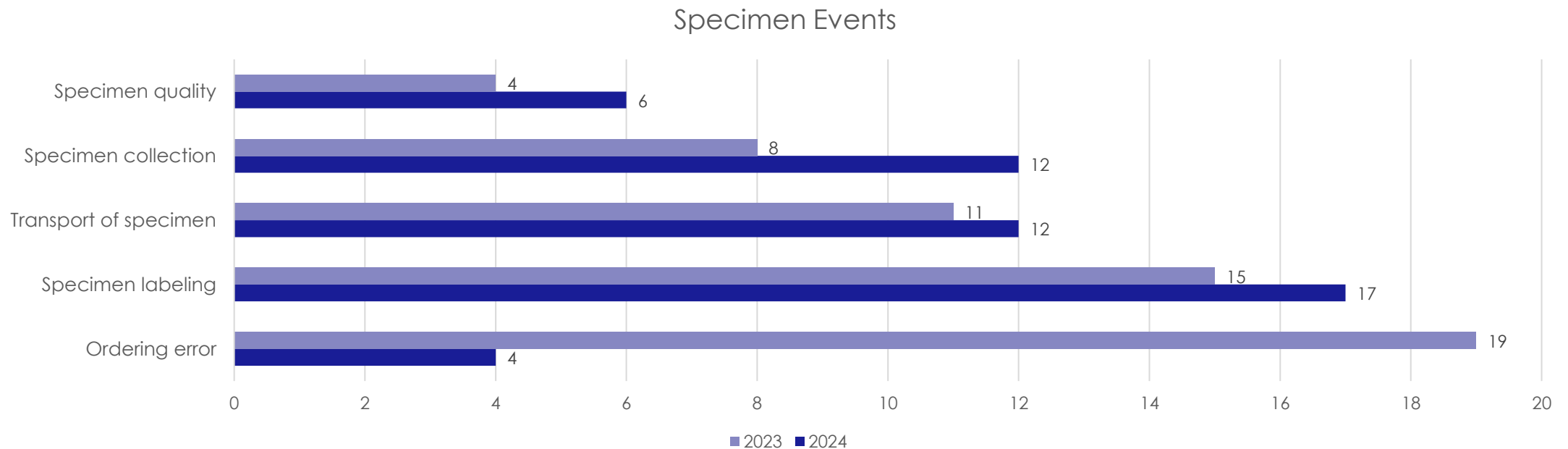➤ Quality Improvement: FY 2024 – 12% reduction in Specimen Events

Intraoperative Specimen Management – Results/Findings

➤ Quality Improvement:

FY 23 Ordering Errors - 33% of the Specimen Related issues

FY 24 Ordering Errors - 9% of Specimen Related Issues = 72% Reduction in Ordering Errors

Specimen Events

Category	2023	2024
Specimen quality	4	6
Specimen collection	8	12
Transport of specimen	11	12
Specimen labeling	15	17
Ordering error	19	4

■ 2023 ■ 2024

Intraoperative Specimen Management – Follow Up

➢ Maintain collaboration with Perioperative and Lab leaders to identify additional improvements

➢ Develop new operational process for community hospitals and ambulatory centers that are using auto-receiving for specimens

➢ Continue developing manager report to provide consolidated information for real time monitoring

➢ Expand specimen tracking to additional facilities throughout the system

➢ Monitor Quality data for continuous improvements

Questions

Thank You

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