

TIER.NET TO RETRIEVE FILES

SPOTLIGHT ON RECORDS MANAGEMENT

Gauteng | Ekurhuleni | North | Tembisa Health Care Centre | CHC
Average Monthly Headcount: 5300



IMPROVEMENT AREA & AIM

Previously, the Facility Booking List (FBL) was used as a reference to pre-retrieve patient files for all upcoming appointments. However, antiretroviral therapy (ART) patient appointments were booked with the Clinician in the consultation room and not recorded in the FBL. This was done to avoid disclosure of HIV status, but as a result, ART patient files were not pre-retrieved resulting in significant delays.

The aim of this change idea was to reduce the rate of un-retrieved ART patient files from 67% to 5% from June to November 2020.



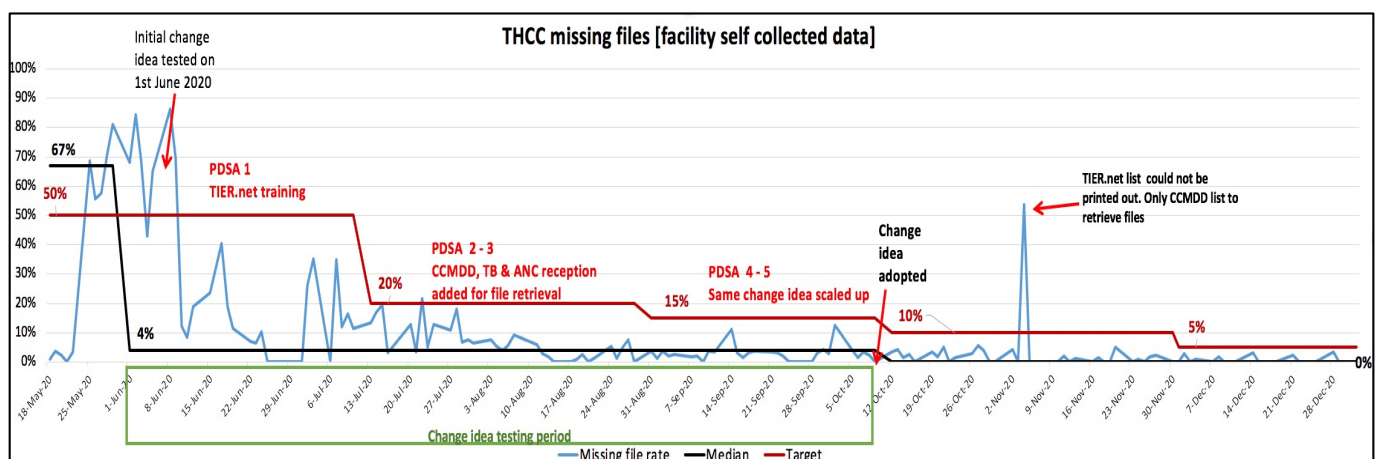
DESCRIPTION

To ensure that the Filing Clerks (FC) had the most accurate and up-to-date lists of upcoming ART patient appointments, the Data Capturers downloaded appointment reports directly from TIER.Net. The list was then printed for the FCs on Mondays. The FCs then pulled all the files for the upcoming week and placed them in an easy-to-access drawer.



OUTCOMES

This new process increased the accuracy of retrieval lists, allowed patients to continue their desired confidential practice of booking appointments directly with their Clinicians, decreased patient wait times, improved staff morale, and motivated staff to implement more improvement projects.



Abbreviations: ANC (antenatal care), CCMDD (centralized chronic medication dispensing and distribution), PDSA (plan, do, study, act), TB (tuberculosis)

STEPS TO IMPLEMENT

PRE-IMPLEMENTATION

- ❑ Train Data Capturer (DC) to download the appointment list from TIER.Net.
- ❑ Allocate responsibilities to FCs and ensure that they share the pre-retrieval responsibilities in different reception areas.
- ❑ Allocate an easy-to-access space for storage of patient files for the upcoming week.

WEEKLY TASKS

- ❑ DC downloads the appointment list for the upcoming week from TIER.Net (every Monday).
- ❑ DC allocates responsibilities to the FCs.
- ❑ FC retrieves the files on the list from the main filing room.
- ❑ FC searches for missing files in the consulting rooms.
- ❑ FC places the pre-retrieved files in the designated storage area for easy access during the upcoming week.

FACILITATORS

- Briefed all staff so everyone was aware of the changes being implemented.
- One FC trained the other to cover work the days they were out.
- Assigned pre-retrieval of files to a specific time each day.
- Added the procedures to the facility standing operating procedure (SOP) which promoted sustained adoption.

CHALLENGES & ADAPTATIONS

- The FBL system was phased out over time to allow for FC to adjust gradually to the new system.
- Data Capturers struggled with downloading the booking list report from TIER.Net → Comprehensive training was provided by the Aurum team.

OTHER FACILITY ADAPTATIONS

- A large print sign was added to remind patients to book their next appointment before exiting.
- In smaller facilities, only one Data Clerk pre-retrieved files, one day in advance, rather than once a week.
- Files were pre-retrieved at the same time each day and monitored by the OM.
- The help desk was placed at the main entrance/exit for booking and staffed by an allocated Clerk or Navigator.

Disclaimer: This Spotlight was developed and implemented by *The Aurum Institute* and DoH staff, with support from OPIQ South Africa. This resource can be freely used and distributed, with acknowledgement of *The Aurum Institute* and DoH, so long as it does not result in commercial gain. The findings and conclusions in this Spotlight are those of the authors and do not necessarily represent the official position of the funding agencies: this project has been supported by the President's Emergency Plan for AIDS Relief (PEPFAR) through the Centers for the Disease Control and Prevention (CDC) under the terms of grant number: 6 NU2GGH002227.

ABBREVIATIONS

- ✓ ANC – antenatal care
- ✓ ART – antiretroviral therapy
- ✓ CCMDD – centralized chronic medication dispensing and distribution
- ✓ FBL – facility booking list
- ✓ HIV – human immunodeficiency virus
- ✓ OM – Operational Manager
- ✓ PDSA – plan, do, study, act
- ✓ SOP – standard operating procedures
- ✓ TB – tuberculosis)

QI PROCESS

A Root Cause Analysis addressed long wait times for ART patients. Through the use of a Cause and Effect diagram it was identified that 67% of ART patient files were not being pre-retrieved.

STAFFING & RESOURCES

- ✓ EPI Nurses
- ✓ Filing Clerks
- ✓ Data Capturers
- ✓ No additional resources were required.