C&W Clinical Document Standardization for ePOPS (electronic Policies, Order Sets, Procedures & Standards)

Style Guide

January 10th 2017

Table of Contents

Purpose

The purpose of this document is to guide standardization of all documents kept on the ePOPS Clinical Documents Repository solution. Although ePOPS only refers to a few document types, several are on the site. Currently several document types kept on ePOPS, however more will be added over time.

There is a need to standardize naming conventions, formatting, numbering, dates, tag word identification, health topic identification, approval processes and document owner. This guide will also address the need to document any discrepancies within or about a document.

Document Types

- **Policy:** Is a clear, concise, non-negotiable, formal statement directing staff decision-making. It enables and guides informed action, prescribes limits, assigns responsibilities and accountabilities and is secondary to legislation and by-laws. It must align with the mission and vision of the organization. ALL staff are required to comply with the policy.

- **Procedure:** Description of a series of steps required to complete a specific task, intervention or activity

- **Guideline:** Systematically developed, evidence-based strategies and principles that direct actions and decisions for management of specific circumstances. They provide direction for decision-making as well as allow for professional judgment. Generally broad based they describe roles and responsibilities for each professional.

- **Protocol:** A set of required actions to manage a clinical condition, operational issue or population occurrence. Any deviation requires documented rationale

- **Standard:** A desired and achievable level of performance against which actual practice can be compared. It provides a benchmark below which performance is unacceptable. Standards are developed by expert and/or authoritative bodies.

- **Clinical Pathway:** Defined plans of care for specific patient populations during a well-defined period of time. Interdisciplinary with criteria to guide care delivery they define the optimal timing and sequencing of interventions and treatments. Used to reduce variation in patient care they contain defined milestones with established outcomes. Any variances from the pathway are documented.

- **Order Set:** A set of precise instructions detailing actions for prevention, care and/or treatment of a clinical condition. On order set must be made client specific and signed by an authorized health care provider (prescriber). Frequently referred to as Pre-printed orders (in paper charts)

- **Form:** A fillable sheet with demographic information and other related collected data.

- **Algorithm:** A process flow depicted in a graph. Can include a decision process or work process. An algorithm must be accompanied by a policy or procedure.

- **Reference Tool:** A document used to guide practice.

Document Naming

How to Standardized a document name

1. The title should answer the question: What is this document mainly about?

2. Keep titles short, simple and clear, but meaningful (no more than 10-12 words). The title should differentiate the document from other documents in the same subject area.

3. Title should contain key words to indicate the purpose of the document. (See examples below)

4. Avoid abbreviations and acronyms. Only use abbreviations/acronyms in brackets following the long form of the word or title (i.e. Intravenous (IV)). Do not use abbreviations that would not be commonly known. EXCEPTION: use of "NICU" – to differentiate any order set/policy that applies to neonates only and that could conceivably pertain to an adult as well (i.e. Oxygen Therapy: Nasal Prongs).   Another exception would be use of acronym "HIV" as it is commonly known as such and rarely spelled out.

5. Identify broader subject first, followed by specific item or "action" after a colon.

   Eg. Nasogastric Tube: Insertion
   Nasogastric Tube: Irrigation
   Nasogastric Tube: Removal

   Oxygen Therapy: High Flow
   Oxygen Therapy: Delivery Systems and Assessment

   Specimen Collection: Incision or Wound Care Culture
   Specimen Collection: Nasopharyngeal Wash

   Patient Monitoring: Sleep Apnea
   Patient Monitoring: Oximetry
   Patient Monitoring: Intracranial Pressure

   Suctioning: Endotracheal and Tracheostomy Tubes
   Incision Care: Sternotomy and Thoracotomy

6. Avoid unnecessary repetition and redundancy in document title.

7. Avoid unnecessary details (a lengthy title may distract from the central subject).

8. Use capital letters to delimit words.

9. Do not use periods at end of title.

10. Avoid using common words describing the format of a document such as "policy" or "procedure" or "appendix" in the title. At times, it is necessary to use some descriptors for clarity (i.e. Seizure Protocol – as "Seizure" would not stand alone; Fentanyl: Intranasal Administration *Algorithm* – to differentiate from *guideline* of the same name). However, please flag documents that could exist together under one policy title such as latter example.

11. Avoid using numeric characters or symbols (i.e. no policy numbers should be in the title).

Tagging a Document

Tagging a document with key words makes it easier to find. It is important to have a standardized way of determining tag words to ensure consistency and reliability. Please consider the following.

Tag Word Identification

1. Consider the end user's perspective when identifying words.

2. Include variants of a term/phrase if they are commonly used ('Tylenol' for acetaminophen).

3. Include common abbreviations of terms (i.e. common search terms; 'NG tube' for nasogastric tube; 'IV and intravenous').

4. The organization (BCCH vs BCW) and the 'Health Topic' do not have to be included as a tag word as ePOPS will automatically tag the policy under those identified columns.

Health Topic Identification

Documents can be categorized under one or many health topics. This categorization will help the end user find documents only related to an individual health topic. Please consider the following:

1. **WHO** – Who will be using this document?
   When <u>tagging</u> the document, it's important to consider who will be searching for it and what terms they may use to find it. Will the searching criteria be different if the audience is provincial, if different disciplines are searching for it?

2. **WHAT** – What is the document about?
   When <u>filing</u> the document, think about what the document is about. Is it about a medication? A disease? The document should be filed based on the primary subject. Tag words will be used as different ways to search for the document.

3. **WHERE** – Where in the hospital will this document be used?
   Before <u>naming</u> and <u>tagging</u> the document, remember that with Redevelopment, many of the location names in the hospital will change. Rather than naming the document based on the physical location, think about the care setting in which the document will be used in.

4. **WHEN** – When in the hospital will this document be used?
   While <u>tagging</u> the document, think about when the document will be used in the patient's journey through the hospital

5. **WHY** – Why was this document created?
   When <u>tagging</u> the document, think about why the document was created. Is it for educational purposes, to support with decision making?

*To note: If a document still cannot fit into a health topic category after answering the above questions, it can remain 'un categorized'. Please keep in mind that if there is no identified health topic for a document then it is most likely either unique, needs to be or might not belong on ePOPS.

Below is a list of Health Topics available on ePOPS. Please refer to the site for the most up to date list.

No topic	Abortion	Administrative	Admission Discharge Transfer (ADT)
Allergies	Anesthesia	Antepartum	Burns
Cardiac Services	Child Maltreatment	Contraception	Death
Diabetes and Endocrinology	Diagnostic Testing	Ears Nose Throat (ENT)	Education
Equipment	Gastroenterology	General Nursing	Infant Feeding
Infection Control	Infectious Diseases	Intrapartum	Medical Genetics
Medication	Medication Administration	Mental Health	Milk Bank
MotherBaby Care	Nephrology	Neurology	Newborn
Nutrition	Ophthalmology	Pain and Analgesia	Palliative Care (End of Life)

Pathology and Laboratory Medicine	Phototherapy	Postpartum	Radiology
Respiratory	Resuscitation	Substance Use	Surgery
Thermoregulation	Transfusion Medicine	Trauma	Urology
Wound and Skin	Vascular Access	Violence	Orthopedics
Oncology			

Formatting

Standard formatting across all documents allows information to be presented in a clear and concise manner. Please request an appropriate document template from policycoordinator.cw.bc.ca and reference the points listed below:

Standard formatting across all documents

- All documents must have a title
- All documents must have a logo that represents which facility it belongs to: BC Children's or BC Women's or PHSA,

- All documents must have a date of creation
- All documents must have an identification number (Applied by policy office)
- All documents must have a page number(s)

Approval Process

BC Children's Hospital and BC Women's Hospital both have separate approval bodies. Please refer to the appropriate approval process of your organization. The Children's & Women's Best Practice Committee has oversite to all site wide initiatives and administrative policies.

BC Children's Hospital

All documents must be approved through the BC Children's Best Practice Committee prior to upload onto ePOPS. A Designated administrator will facilitate uploading documents to ePOPS

Once a document has been identified for review or creation, the document owner must obtain:

- Formatted Template
- Policy Approval Form

Upon completion of the review/creation, the policy approval form must be completed and submitted to the Best Practice Committee along with the document. These items will be distributed to the Best Practice Committee members for review, and approval will be granted at the next appropriate Best Practice Committee monthly meeting.

BC Women's Hospital

All documents must be approved through the BC Women's Best Practice Committee prior to upload onto SharePoint. A Designated administrator will facilitate uploading documents to SharePoint.

Once a document has been identified for review or creation, the document owner must obtain:

- Formatted Template
- Policy Approval Form

Upon completion of the review/creation, the policy approval form must be completed and submitted to the Best Practice Committee along with the document. These items will be distributed to the Best Practice Committee members for review, and approval will be granted at the next appropriate Best Practice Committee monthly meeting.

Document Owner

A document must be owned by the most appropriate clinical team or department. It is up to the clinical team/department to delegate any changes to a document or document development to the most appropriate individual(s) within the department. For more information please refer to your best practice policy development process.

Identifying Document Discrepancies

If a document does not fit into one of the Document Types (standard, policy, clinical pathway, guideline, procedure, protocol, order set – see document types definitions) **, it will need to be determined by the related Best Practice Committee as to its relevance for posting on the ePOPS site.** Note any specific problems with the document for later follow-up. Examples might be:

1. Seems to be the same policy as a previous one under a different title.

2. Policy created as unit-specific but should apply to entire organization or broader audience.

3. Does not address the issue in a useful way (i.e. simply refers reader to a different document).

4. Directly relates to a different document or group of documents (i.e. is one of several appendices to a separate policy).

5. Medication specific (should it be under the Pharmacy manual?)

6. Names specific products by brand name or Peoplesoft #.

7. Names specific wards or units (may change names in future).

8. Not formatted as in approved template.

9. Links to a specific website for information.

10. Requires clarification to standardize terms (i.e. Gastric tube, Enteral tube, Feeding tube or Nasogastric tube?)

Please contact the policycoordinator@cw.bc.ca if any document discrepancies are identified.

Contact

Should you have any questions regarding how to create a document for ePOPS, how to get a document approved and posted, or to request any changes to the ePOPS website that are not addressed in this Style Guide, please contact policycoordinator@cw.bc.ca