

# Information for staff

August 2014



**TRANSFORMATION  
THROUGH  
TECHNOLOGY**

**It's time  
for change  
Get ready,  
get  
involved.**

*"No more  
lost notes"*

Deanne Driscoll, Deputy Nurse Director

**Find out all about the new Electronic  
Document Management System in this issue**

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Sheffield Teaching Hospitals   
NHS Foundation Trust

# More than 3,000 staff get involved and give their views



**Dr David Throssell,**  
Medical Director

You will hopefully now be aware of the Transformation Through Technology programme, which involves a £35 million investment in technological change over the next five years.

We are starting to develop new technology systems so staff can access patient information, whenever and wherever they need it.

To make this a success, everyone across the Trust needs to get involved and be aware of the changes - this is a great opportunity for you to influence how this new technology operates and how we will use it.

## What will happen when?

**Subject to approval, we are now aiming for the following:**

- The Electronic Patient Record (EPR) will be introduced in September 2015, subject to satisfactory assurances and approval of the business case this year.
- The Electronic Document Management System (EDMS) will be introduced from Spring 2015. We expect it to be fully rolled out by Spring 2016
- The new Clinical Portal, which will bring all our patient record systems together, is expected to be introduced by Spring 2015

Thanks to everyone who has already attended one of the demonstrations or workshops - more than 500 people have attended. And thanks to those who took part in the online survey to give us their views - more than 2,000 staff. It was very encouraging to hear that the majority of you were 'excited' by the programme.

Highlights of the survey include:

- 78% of staff said they were aware of the Transformation Through Technology programme but of course we will continue to raise awareness so that everyone knows how to get involved.
- Majority of respondents say they are excited by the change programme, want to be involved and want to know more.
- Majority of respondents felt the aims of the programme were to improve patient care and ways of working
- Preferred communication methods are:
  - Email bulletins
  - Transformation newsletter
  - Roadshows

There were also a number of really helpful suggestions and comments which are being considered.

One suggestion was to have more detail on the three systems and potential benefits for patient care which we are going to implement.

So this issue of the newsletter is focused on the new Electronic Document Management system

and I hope you will take a few minutes to read about this exciting development that could bring an end to chasing notes around different departments.

## Transformation Roadshows - come along and find out more

There will be an opportunity to pop along and talk to the Transformation Through Technology team and find out more at a series of roadshows. All sessions will run from 11am to 2pm:

### **18th August:**

D floor dining room - Royal Hallamshire Hospital

### **19th August**

Clocktower dining room, Northern General Hospital

### **20th August**

Huntsman dining room, Northern General Hospital

### **21st August**

D floor dining room - Royal Hallamshire Hospital

### **22 August**

Huntsman dining room, Northern General Hospital

### **26 August**

D floor dining room - Royal Hallamshire Hospital

### **27 August**

Clocktower dining room, Northern General Hospital

### **28 August**

D floor dining room - Royal Hallamshire Hospital

### **29 August**

Clocktower dining room, Northern General Hospital

## EDMS - Electronic Document Management System

### It's time for change - Get ready, get involved

#### What is an Electronic Document Management System (EDMS)?

EDMS is about converting paper patient casenotes into digital format, so that they can be viewed, moved around and managed electronically on screen.

We will be scanning casenotes and then storing our digitised notes within a sophisticated electronic document management system that will allow them to be available on screen, when and where they are needed, at the point of care.

The casenotes will be accessible 24/7 and will be able to be viewed by different people working in different locations at the same time.

This provides a stepping stone towards the Trust becoming completely paperless by 2018.

#### The key benefits:

- Enables instant access to casenotes, 24/7, wherever staff have access to a Trust computer

- Lets more than one person access casenotes at the same time
- Saves staff time searching for patient casenotes
- Enables faster electronic searches, rather than manual
- Improves security of patient notes and reduces the likelihood of documents being lost or misfiled
- Reduces the need to transport casenotes from hospital to hospital or from department to department
- More accurate clinical coding which means maximising our income
- Saves storage space as casenotes are electronically stored

#### What's happening at STH?

We are moving into the digital age and converting from paper to electronic. The Trust is planning to install a high-tech electronic document management system which will meet our needs and change the way we work.



**Val Doughty - administration and clerical team supervisor, infectious diseases:**

“The clerical team is excited about the new technology - it's about time we were brought into the 21st Century and we're very pleased it's all coming so quickly and becoming a reality. We've even put ourselves forward to becoming an early adopter. Of course, it's also a bit scary, like any change, but the bottom line is it will be so much better for patients.

“We're really excited about what the electronic document management system will mean - getting rid of paper and the endless paper chase. It's not always easy for other areas to access the Infectious Diseases notes and with paper notes there's always a risk that some vital information could be missed, so being able to see the whole of the patient's notes electronically will be so much better for patient care.”



**Alan Anderson, Physician/geriatrician and chair of the patients records committee, project team EDMS:**

“I've been helping to steer the clinical aspects of the project and encouraging a pragmatic approach. I have a good understanding of the problems we have with the paper record and I'm really enthusiastic about going digital. If we do it correctly, it should make things so much better for patient care.



**Dora Deane, Operational Manager, Medical Secretariat, Weston Park Hospital:**

“Here at Weston Park Hospital we are looking forward to EDMS. There are clear benefits - we currently use a van which transports notes to five peripheral clinic locations each day. There are also personal benefits for our staff - no more looking for notes that are mysteriously missing! Initial discussions with the Transformation Through Technology (T3) team have been productive and I'm sure we will be able to iron out any problems prior to implementation.”



**Deanne Driscoll, Deputy Nurse Director, Specialist Cancer, medicine and rehabilitation:**

“I'm not a big paper fan so I truly believe it will make use more efficient and ultimately it will be better for our patients.

It's very time consuming for people to pull clinic notes and arrange transport which obviously increases the risk of patient notes going astray. So if they are electronic, surely this will be better.

And if the patient is in Chesterfield, for example, and someone here needs to see their notes, they can see them at the same time.

## Why are we doing this?

### Improving patient care

Patients deserve and expect the best care. If we are to remain one of the leading NHS hospital trusts in the country, we need to move into the digital age. EDMS will mean we can view patient details at any time and at any location across the Trust, immediately. This is a good thing for our patients and will vastly improve the patient pathway. As other hospitals introduce EDMS, our patients will expect us to do the same.

### Improving the patient experience

By providing clinicians with all the information they need, at all times across the Trust, there will no longer be a need to cancel or delay a patient's visit to hospital because their casenotes are not available. All of the information we know about the patient will be readily available on screen, giving each patient we treat the confidence that we are working on their care in a joined up way.

### Going paperless

We currently have approximately one million patient casenotes in nine libraries across the Trust, a number which is increasing every day. The NHS has committed to being paper-less by 2018. We have been scanning the casenote archive for 20 years to free-up space for new casenotes within the main libraries, but on a much smaller scale than we intend to do in the future.

In addition to the nine libraries, there are a number of smaller libraries and file stores within the Trust (e.g. Audiology) that do not form part of the main patient record. These are not included within the initial scope of this project and will be considered once the main libraries are underway.

### Improving patient safety

Currently multiple separate casenotes exist for the same patient due to the number of patient record libraries. Once the casenotes can be accessed electronically, the notes for a patient will be consolidated into a 'single' patient record, thereby improving patient safety.

Ultimately the digitised case notes will become part of an overall Electronic Patient Record and will be a single source of patient information. We will have a single source of the truth.

### Security of patient information

Patient casenotes need to be stored and transported in a safe and secure environment. EDMS controls access to patient information and so improves auditing. The electronic case note also reduces the likelihood of losing a record.

### More efficient

EDMS promises to save us time searching for notes, transferring notes from one site to another, analysing and comparing notes.

## The EDMS system

### Choosing the right suppliers

We have been looking at a number of suppliers for the technology we need. It is important that we choose the right system and get value for money. Each option has been assessed and given a score, based on its merits. System 'usability' has been at the heart of the selection process. Our supplies department has been closely involved from the outset to help us purchase the right one. We are now close to identifying a preferred supplier.

### Gathering feedback from staff

We have engaged with clinicians, change champions and other staff to find out exactly what they need and how they want the system to work. The shortlisted EDMS systems have been presented to staff to get their feedback, and these demonstrations were well attended.

### Visiting other hospitals and fact finding

A number of staff have visited other hospitals which already use an electronic document management system. We have looked at the pros and cons of each one and spoken to staff at other hospitals to get their views on the shortlisted systems and supplier capability. We now understand more about what sort of system we need here in Sheffield.

### The business proposal

Before we can go ahead with purchasing and implementing an EDMS, it is important to outline the business need for the Trust and get approval for this. An outline business case has been approved and a full business case will be submitted to the Trust Board shortly.

### When will it happen?

We aim to begin the implementation of electronic document management this year.

The preferred supplier is expected to be identified shortly, although the contract will not be fully completed until later this year.

We are holding a series of change workshops and awareness sessions with staff during August and September.

The aim will be to begin piloting the EDMS in February 2015, with full roll out beginning Spring 2015.

The Trust has nine medical record libraries - one at the Royal Hallamshire Hospital and one at the Northern General Hospital, and seven standalone specialty libraries across the Trust sites. The standalone libraries are: Infectious Diseases, WPH, Orthopaedics, Plastics, Neurosurgery, CCDH, Renal and Spinal Injuries.



**Stephen Payne, clinical coding/data capture:**

“ We're waiting with baited breath to see what the new system will look like. If everything goes to plan we feel this will be a big improvement which has great potential. We're responsible for taking all the information from the notes and inputting them into an encoder so that the information can be extracted for things such as payment and statistics.

Sometimes this is a very difficult task with paper notes - we don't always get the notes on time as we're seen as just the end of the line. So with the electronic document system we won't have to worry about getting hold of the paper notes. We realise there will be a change over period, but eventually we will be able access everything which will be great. In theory it all seems excellent, but in practice we may have some concerns, such as, if everyone is wanting to access something at the same time, how fast will it be and will our IT infrastructure be able to cope.

# Electronic document management system feature...

The transition from paper to electronic records will, therefore, take time. We are aiming to start the process as soon as we have purchased the right technology.

## How will it happen?

Patient casenotes will be converted to electronic records through a 'scan on demand' process, when each set of casenotes is requested.

Any paper which needs adding to the existing record will be scanned and added to the EDMS. New patient records will be scanned from the outset.

This will change how we provide notes to clinics, wards and to support staff such as medical secretaries, and how they are maintained. We will be working with staff within two pilot specialties - one standalone 'speciality' library, and one main library 'specialty', to understand how the new processes will work and how we should set up the system so staff can access what they need, when they need it. Business Change workshops are being set-up for this purpose.

The pilots will enable us to test the processes, and following completion, we will commence a phased roll-out across the Trust. Roll-out will need to be carefully managed to deal with any patients whose case note becomes digitised, turning-up anywhere in the Trust.

We will be using a blended approach to EDMS training to meet different needs, encompassing e-learning, classroom led and trainer facilitated sessions in a clinical setting.

## What will it look like

The patient case notes will be easy to view and navigate on screen, once scanned into the new EDMS. Using desktop PCs, laptops or a PC on wheels initially, staff will be able to navigate, flick through pages and search through the notes very easily.

The amount of paper which we need to add to the EDMS will reduce considerably when the Electronic Patient Record (EPR) is implemented.

The digitised case notes will eventually be viewed as part of the electronic patient record (EPR) on a desktop computer, laptop or a PC on wheels, and through mobile devices in the future.

## What it means to me?

If you use the existing paper patient casenotes within the nine libraries, or you are involved in the handling of casenotes, EDMS will affect you.

## Staff involved will include:

- Clinicians
- Medical secretaries
- Admin staff
- Waiting list and pathway co-ordinators
- Clinic clerks
- Ward clerks
- Clinical coding staff
- Medical records staff
- Legal staff
- Research teams
- Clinical scientists
- Pharmacists

If you would like to know more, or if you have any further questions regarding the EDMS Project, please contact the Transformation Through Technology office at [transformation@sth.nhs.uk](mailto:transformation@sth.nhs.uk)

For further information on the Transformation Through Technology programme email: [Transformation@sth.nhs.uk](mailto:Transformation@sth.nhs.uk) or call ext 15756

