## Project Description / Purpose

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| **Project Name:** | Implementation of EHR Template for Documenting HRSN Screening Results and Action Plans |
| **Clinic:** | Sanctuary Recovery Centers |
| **Process:** | Increase patient satisfaction among patients representing underserved communities. |
| **TIP 2.0 Process Milestone:** | *Screening* |
| **Project Description / Purpose** | |
| *Enter a brief description of the project, the purpose for conducting the project, and a general description of what is expected from the project.*  This project aims to implement a new Electronic Health Record (EHR) template for documenting Health-Related Social Needs (HRSN) screening results and action plans. The project aims to streamline the documentation process, improve the accuracy and completeness of patient records, and enhance communication among healthcare providers. The expected result is a more efficient and effective process for managing HRSN screenings and follow-ups, improving patient outcomes and satisfaction. | |

## Project Overview

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| **Problem Summary:** | *Enter a description of the problem or performance gap identified here. Include descriptions of the impact on staff and/or patients.*  *Currently, the process for documenting HRSN screening results is inefficient and prone to errors due to manual data entry and lack of standardized procedures. This leads to delays in patient care, increased workload for staff, and potential gaps in follow-up care. The impact on staff includes frustration and burnout, while patients experience delays in receiving necessary services and support.* |
| **Desired Outcome(s):** | *Describe the desired outcome(s) of the project.*   * *Streamlined documentation process.* * *Improved accuracy and completeness of patient records* * *Enhanced communication among healthcare providers* * *Timely follow-up and referrals for patients* * *Increased patient satisfaction* |
| **Benefits:** | *Enter a description of the expected benefits here.*   * Reduced delays in patient care * Decreased workload for staff. * Enhanced quality of patient care * Improved patient outcomes * Higher patient satisfaction |

## Timeline

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|  | **Description of Task and Completion Dates** |
| **Task 1** | *Assess the current documentation process and identify inefficiencies. July 15, 2024* |
| **Task 2** | Develop and configure the new EHR template for HRSN screening. August 15, 20204 |
| **Task 3** | Train staff on using the new EHR template. September 1, 2024 |
| **Task 4** | Implement the new EHR template in a pilot phase. September 15, 2024 |
| **Task 5** | Evaluate the pilot phase and make necessary adjustments. October 15, 2024 |

\* Add new rows as needed.

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| **Task 6** | *Full implementation of the new EHR template across the clinic. November 1, 2024* |

## Project Scope

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| **In Scope Project Objectives** |
| *Enter a description of the objectives that are in scope here.*   * *Develop and implement an EHR template for HRSN screenings.* * *Train staff on new documentation procedures.* * *Pilot the new template and gather feedback.* * *Make necessary adjustments based on pilot feedback.* * *Full clinic-wide implementation of the new template.* |
| **Out-of-Scope Project Objectives or Activities** |
| *Enter a description of the objectives or activities that are out of scope here.*   * Development of new HRSN screening tools. * Changes to non-screening related EHR processes. * Long-term patient outcome studies beyond the initial implementation phase. |

## Project Team

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| **Team Lead:** | Rashon Ambrosy | **Project Champion:** | Wendy Rodgers |
| **Process Owner:** | Ulonda Old Coyote | **Process Manager:** | Magen Turnbo |

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| **Stakeholders** | | | |
| **Stakeholder** | **Title** | **Department** | **Organization** |
| *Matthew Kane* | *Admissions Director* | *Admissions* | *Sanctuary Recovery Centers* |
| *Susan Lovell* | *Medical Case Manager* | *Medical* | *Sanctuary Recovery Centers* |
| Paula Brungardt | Medical Director | Medical | Sanctuary Recovery Centers |
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| **Project Team Members** | |
| **Name** | **Team Role** |
| *Rashon Ambrosy* | *Care management* |
| *Susan Lovell* | *Medical Case manager* |
| Magen Turnbo | TIP 2.0 Manager |
| Wendy Rodgers | TIP 2.0 Director |
| Ulonda Old Coyote | Director of Operations |

## Signatures

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| **Process Owner** | Ulonda Old Coyote |
| **Project Champion** | Wendy L. Rodgers |
| **Team Leader** | Rashon Ambrosy |