Training Supplement: Clinical Pathways

Clinical Pathway—Surgical Patient

Pathways help our organization provide consistent, standardized care by outlining the course of treatment needed for patients with common medical conditions or undergoing common surgical procedures. Pathway tools address patient care across the entire care continuum and are divided into a series of steps based on recommended periods and expected patient outcomes.

Each pathway step organizes the outcomes or clinical documentation necessary to complete that step in the patient’s care. This approach enables all clinicians to easily see what steps are expected for a patient with a specific condition, identify what steps have been completed, and document/track patient outcomes on the pathway to ensure that the current plan of care produces the best results for the patient. Here are the tools.

Implement the Pathway and Enter Initial Orders—Provider

The patient’s provider must determine if the patient is a candidate for the pathway. To apply an Epic@UNC clinical pathway to the patient, the provider must place the pathway on the patient. Typically, there will be corresponding order sets to order along with the pathway.

1. Log in to Epic and access your Schedule.
2. For surgical pathways, open the Prep for Procedure activity (defaulted in the left navigation panel).
   - If you use Epic in your clinic but the Prep for Procedure activity is not defaulted:
     1. Open your patient’s chart.
     2. Select the More button at the bottom of the left navigation panel.
     4. Star it to make it a Favorite.
   - If you do not use Epic in your clinic, access Prep for Procedure from the Epic toolbar, find your patient and open their chart.
3. Open the Order Sets section and search for ‘pathway’ in the Order Sets and Pathways search field.
4. Highlight the appropriate pathway and Accept.
5. Click the blue hyperlink to open the pathway.
6. Note all the outcomes to be measured are pre-selected and the step duration is pre-defined.
7. Select the **Start All Non-Order Pathway Items** to start the pathway and apply it to the patient.

8. Note no orders are contained in the pathway.
9. Sign the Visit/Close the chart when done as usual.

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**Document Step 1 – Prior to Day of Surgery**

If the patient is having a Pre-admission Testing (PAT) visit, then PAT starts and completes the documentation on this step of the pathway. If no PAT appointment is scheduled, then the Clinic starts and completes and the documentation on this step. This step’s outcomes can only be completed by the location that starts this step. Step 1 cannot be started in the clinic and finished in PAT or another clinic.

1. Log in to Epic and open the chart when the patient arrives.
   - A Best Practice Advisory (BPA) may alert you that the patient is on a pathway.
   - Click **OK**.
   - This BPA indicates the provider has not started the non-order pathway items as described above. If you see this BPA, click **Accept**. (Open Pathway is highlighted so you are accepting the highlighted choice.)
   - If you defer the pathway, you must provide a reason.
2. Open the Pathway Management activity in the left navigation panel.
3. Click the blue hyperlink—Start Prior to Day of Surgery-Step 1.
4. Click **Start Step**.

5. Click the **Start All Non-Order Pathway Items** button on this step.

6. Review the outcomes on this step of the pathway:
   - Click **Active Pathways** in the Pathway Management menu.
   - Click the yellow note pad icon to jump to the Pathway Review activity.
   - Review the outcomes for this step. (Current step tab is darker.)
   - Click **Mark as Reviewed** anytime you review the pathway outcomes according to your facility policy.

7. Complete any of the encounter requirements (update allergies, medication history, labs/tests, education, etc.)
8. Note Patient Education titles and points are automatically applied for some of the pathways.
   - Complete the education points for this step to support the pathway outcomes.
9. Go back to the Pathway Review Activity in your navigator if you have not closed out of the patient’s chart. Otherwise go to the Pathway Management Activity and follow Step 6.

   - Click the Document Outcomes button.

   - Note that the Current Step view is defaulted. Mark each outcome as **Met** or **Not Met** based on documentation in the encounter.
   - Note that some outcomes are **Suggested** (dashes) as **Met** or **Not Met** based on the presence or absence of documentation in the system. These are ONLY suggestions.

   - Document the outcomes as **Met** that you or the patient have completed/have done based on documentation in the encounter.
- Document the outcomes that you or the patient have not completed/have not done based on documentation in the encounter as **Not Met**. Additionally document the Category (Clinical Pathways) and Variance fields and any Comments for **Not Met** outcomes.

11. Click the X in the upper right of the window to close. Hovering over the clock icon shows the last choice documented and who charted it. **Met** items are noted with a check; **Not Met** items are noted with an exclamation point.
12. Return to Pathway Review to see the status of the pathway and **Mark as Reviewed**.
   - If a mistake is noted, click **Document Outcomes**, go back and re-select the correct response for the outcome.

13. Complete the visit as usual.

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**Document Step 2 – Perioperative-Day of Surgery**

On the day of surgery (DOS), Perioperative staff and Anesthesia start/complete the documentation on this step of the pathway.

1. Log in to Epic and open the chart when the patient arrives and complete usual chart activities.
2. Open the Orders activity and click the Pathways tab.
3. Click on the blue pathway hyperlink.
   - Note you may also have the Pathway Management activity defaulted in the Left navigation panel (Anesthesia).
4. Scroll down in the pathway to the Perioperative – Day of Surgery Step 2 and click **Start this Step**.
5. Select **Start Step**.
6. Select **Start All Non-Order Pathway Items**.

7. Review the outcomes on this step of the pathway:
   - Click the Pathways tab under the Orders activity and scroll to the top.
   - Click the yellow note pad icon to jump to Pathway Review activity.
   - Review the outcomes for this step. (Current step tab is darker.)
   - Click **Mark as Reviewed** anytime you review the pathway outcomes per facility policy.

- Note there are outcomes for three phases of care—Pre-Op, Intra-Op, and PACU.
- The responsible staff in each area follow these steps.
- Click the Document Outcomes button.

- Mark each outcome as Met or Not Met before the patient leaves the perioperative area.
- Note that some outcomes are Suggested (dashes) as Met or Not Met based on the presence or absence of documentation in the system. These are ONLY suggestions.

- Document the outcomes as Met that you or the patient have completed/have done.
9. Click the X in the upper right of the window to close. Hovering over the clock icon shows the last choice documented and who charted it. Met items are noted with a check; Not Met items are noted with an exclamation point.

10. Return to Pathway Review to see the status of the Pathway and Mark as Reviewed.

11. Repeat these steps for each phase of care on the pathway before the patient leaves the perioperative area.

   - NOTE: If a patient becomes a PACU boarder (waiting for an inpatient bed), operational leadership decides whether the next step of the pathway is started or whether to wait until the patient arrives on the unit.
When the patient is transferred to an inpatient unit following their recovery in PACU, the post-op clinician needs to complete several tasks to ensure that step duration timer is accurate and the pathway progresses appropriately. Additionally tasks need to be completed each day until the patient is discharged to move the patient along the pathway.

1. Once the patient is admitted to their bed, locate the patient and open their chart.
2. Open the Orders activity and click the Pathways tab.
   - Pathway documentation is also found in the More activity button. (Look for Review Pathways.)
   - To start the post-operative part of the pathway, click the blue pathway hyperlink.

3. Scroll down in the pathway to the Post-Op Day 0 (Day of Surgery until 2359) – Step 3.
   - To see the expected outcomes and to ensure that the pathway has the correct labeling for each post-op day, click three buttons in this order:
     1. Start this Step
     2. Edit Duration
     3. Start All Non-Order Pathway Items

   - **Start this Step** initiates this part of the pathway.
   - **Edit Duration** ensures that the post-operative day 0 duration is accurate based on when the patient is transferred from PACU. This ensures that each subsequent step begins automatically at the appropriate time.
     1. Click the radio button next to “on” in the End section.
     2. In the date field, enter T for today. In the time field, always enter 2359—even if the patient arrives on your unit just minutes before 2359. *This is crucial for each subsequent step to begin on time.
     3. Press Tab on your keyboard and then click Accept.
- **Start All Non-Order Pathway Items** initiates the expected outcomes to be completed by or for the patient on Post-Op Day 0 through the rest of their hospital stay.
- **NOTE:** If the wrong duration time is chosen, click back to the PostOp Day 0 line and Edit Duration to the correct day and time.

4. Review the outcomes on the pathway:
   - Click the yellow note pad icon to jump to the Pathway Review activity.

   - Review the outcomes for this step. (Current step tab is darker.)
   - Click **Mark as Reviewed** in the Pathway Review screen anytime you review the pathway outcomes per facility policy.

5. Document the pathway outcomes.
   - Click **Document Outcomes**.
   - Make sure you click the appropriate day of the pathway.
   - If the Pathway Review window is not open, click the yellow note pad icon as above to open the window.
- Mark each outcome as **Met** or **Not Met**.

- Note that some outcomes are **Suggested** (dashes) as **Met** or **Not Met** based on the presence or absence of documentation in the system. These are ONLY suggestions.

- Epic is trying to help the clinician with documentation of the outcomes by looking for charting in discreet data fields.

- You may see bold red or bold black prompts for each outcome.

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  **Please manually evaluate this outcome. Do not rely on the suggestion.***

  *If using suggested outcomes, the outcome must be evaluated before 2359 of the same post-op day.*

- Bold red prompts indicate data may or may not be pulled in, but you should always manually evaluate/verify the outcome as the status always defaults to **Not Met**.

**Scenario 1:** The expected outcome is that the patient should walk 50 feet two times. The clinician documents in “x2” in the flowsheet but the **Not Met** button shows as Suggested. If the clinician knows that the patient did in fact meet the outcome, they click the **Met** button regardless of suggestions by the system.

**Scenario 2:** In the screenshot below, Epic recommends that the outcome was not met because the **Not Met** button has the broken line around it. Before you answer not met, look at the MAR to determine if the antiemetic was given in the time frame of the identified post-op day.

If you need to update documentation, leave the pathway screen and add information to the MAR or Flowsheets. When you return to the pathway screen, **press the F5 button on your keyboard to refresh** the screen and see your newly added documentation.

- **Bold black prompts** display when charted data pulls in for an outcome. However, the warning displays to ensure you evaluate the data in the correct time frame for the post-operative period outcome(s).

  1. Once a pathway step has been initiated, documentation on each suggested outcome should ideally be completed before 2359 of that day.
2. If outcome documentation cannot be completed by 2359 of that day, evaluate the outcome to the best your knowledge, save and go back and modify that day when you have time. Be aware that suggested outcomes may no longer be valid suggestions because the pathway time clock has rolled over to the next day.
   - Document the Category (Clinical Pathways) and Variance fields and any Comments for **Not Met** outcomes.

6. Click **Close** when outcome documentation is complete.
7. Note that as the patient progresses each day, the daily outcomes change.
   - Repeat the steps for documentation until the pathway is completed.
   - Progressive days do not need to be started or have durations marked as long as the first clinician on post-operative day 0 starts that step and marks the duration as described above.
8. Note that providers may choose to end a pathway based on the patient’s condition but otherwise, the pathway is automatically completed two hours after the date and time of discharge.
   - Once the pathway has been discontinued or completed, the pathway cannot be opened to document any missed outcomes.
   - **NOTE:** If any prior goal documentation needs to be edited, repeat the steps in this section beginning at point #5. Change goal outcomes per your facility policy.

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**Discontinue or Complete a Pathway--Provider**

If a patient should no longer be on the pathway due to complications or if they have completed the pathway successfully, a provider can discontinue or complete the pathway in the Pathway Review activity. A reason for discontinuing a pathway is required. Note that completing or discontinuing a pathway does not complete or discontinue any related orders. Discontinuing a pathway also does not resolve or document anything else in the patient’s chart. No further pathway outcomes can be documented once the pathway has been completed or discontinued. Otherwise, a pathway automatically completes 2 hours after a patient is discharged in Epic@UNC.

1. Open the patient’s chart and open the Pathway Management activity.
2. Click the blue pathway hyperlink.
3. **Discontinue Pathway.**
4. Enter a Discontinue Reason and/or Comments and Discontinue.

Additional Pathway Support Tools and Reports

Three column options have been added to for you to pull into My Lists in order to display pathway information.

1. Active Pathway Status
2. Active Pathways

![Image of Active Pathways]

3. Pathways?

![Image of Pathways]

Report changes help to view Clinical Pathway information in the patient’s encounter.

1. Clinical Pathways has been added as a Quick Link in Patient Summary.

![Image of Quick Links]

2. Clinical Pathways has been added to the Index report.

![Image of Index report]