UCare Navigator: A Dynamic Guide to the Hybrid Electronic and Paper Medical Record in Transition

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Abstract

During the phased transition from a paper-based record to an electronic health record (EHR), we found that clinicians had difficulty remembering where to find important clinical documents. We describe our experience with the design and use of a web-based map of the hybrid medical record. With between 50 to 75 unique visits per day, the UCare Navigator has served as an important, real-time aid to clinicians practicing in the transitional environment of a large EHR implementation.

Description of Problem and Project

In 2006, mock-JCAHO-survey consultants confirmed what some at our institution suspected: As we rode on the wheels of change from paper to an electronic health record, some clinicians were being left in a cloud of dust. Specifically, surveyors found there were users who had difficulty finding important clinical documents. These consulting surveyors found that there were clinical users who could not recall if a particular document remained on paper or was recently transitioned to the electronic system. And even if a clinician did remember that a document had recently changed to electronic format, some did not always know how to navigate through the EHR user interface to find that particular document. Traditional modes of clinical staff communication including EHR training and large-scale announcements about the EHR transition were both forgettable and incomplete in their reach. Paper cards that were strapped to computer terminals and posted at nursing stations to help guide users were often out-of-date shortly after they were printed.

The UCare Navigator application was developed to be a dynamic map of a hybrid medical record in rapid transition. The web-based Navigator tool is incorporated into the EHR desktop. Therefore, at the point of care, with one click, a clinical user can find where a document, or specific type of patient data, resides in the hybrid record. Simultaneously, the user also sees step-by-step instructions on how to navigate to that document. Documents can be queried by string search, originating hospital unit, or document type. Users also can pick a document from a “Top Documents” list or a full EHR map (site map).

With between 50 to 75 unique visits per day, the UCare Navigator has served as an important, real-time aid to clinicians practicing in the transitional environment of a large EHR implementation. Following UCare Navigator implementation, our institution received extremely positive comments from JCAHO surveyors in 2007, including from those surveyors who asked clinicians to find specific documents within the hybrid paper/electronic medical record.