

## MEDICAL EDUCATION

# PROFESSIONAL DEVELOPMENT CAN BE EPIC! LEVERAGING THE EHR IN TEACHING PROFESSIONAL ROLES (PRESENTED AT SGIM ANNUAL MEETING, 2018)

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The electronic health record (EHR) is a way of life in clinical medicine. Building residents' skills in navigating EHRs efficiently while imparting the granular details of managing in-basket messages not only represents a significant challenge but also brings tremendous opportunity to teach accountability, the role of the doctor as team leader, and the unique roles and responsibilities of each member of the interprofessional team. For instance, which tasks can and should be shared with the team of nurses, pharmacists, or social workers? Residents are learning how to navigate their future roles as team leaders by learning how to effectively collaborate and communicate with all team members. Recognizing this need, we developed a tool to teach both EHR skills and interprofessional roles simultaneously in the ambulatory setting.

The tool was developed organically in an educational ambulatory setting where formalized EHR navigation workshops were already being taught. During EHR training and subsequent clinical practice, resident questions continually concentrated on the management of follow-up processes in patient care, the workflow of in-basket management during and outside of clinic sessions, and the clarification of team members' roles and responsibilities. As a result, it became natural and necessary to add the element of professional development to everyday teaching by developing a tool that can teach professional development, team roles, and the use of EHR simultaneously.

By anchoring the tool in the ACGME milestones, which are most relevant to interprofessional teamwork and ambulatory clinical care, the tool can assess resident competencies as they relate to EHR domains by defining observable behaviors for each milestone. The tool focuses on the following milestones: Systems Based Practice (SBP1), Professionalism (PROF1 and PROF2),

and Interpersonal Communication Skills (ICS2 and ICS3). For each milestone, the tool suggests competency benchmarks for both in-basket management and ambulatory encounter management, allowing for better assessment of these milestones as they relate to outpatient care (see figure). During the workshop, case scenarios, which were designed to illustrate various levels of competency in trainee's responses to lab results and patient requests, were employed to demonstrate the use of the curricular tool and aid with faculty development. These cases and the curricular tool can easily be customized for different institutions, settings, and learners. The following figure on page 9 illustrates a portion of the curricular tool for illustrative purposes.

Professionalism is often noted as one of the more difficult competencies to teach, assess, and remediate. While the EHR can be the source of considerable frustration, incorporating the teaching of interprofessional roles into EHR teaching could improve learners' engagement by linking the content to core skills in doctoring and team leadership. The curricular tool that we developed makes explicit the assessment of trainees' professionalism in the context of their navigation of the EHR. With the use of this tool, programs can not only make the teaching of interprofessional teamwork within the EHR clearer but also can more easily expand observations of resident behaviors and practices to inform milestone assessments. In other words, we aim to open up the EHR space as another domain for data gathering on resident performance on milestones. Next steps will include dissemination of the tool and assessment of its value by gauging residents and faculty satisfaction, demonstration of skills by trainees as ambulatory team leads, and delivery of higher quality feedback to trainees from more frequent direct observations by faculty.

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<b>ACGME Milestone (SBP1): Works Effectively Within An Inter-Professional Team (e.g., peers, consultants, nursing, ancillary professionals, and other support personnel)</b>		
<b>Critical Deficiencies</b>	<b>At Expected Competency</b>	<b>Aspirational</b>
<ul style="list-style-type: none"> <li>refuses to recognize the contributions of other inter-professional team members</li> <li>frustrates team members with inefficiency and errors</li> </ul>	<ul style="list-style-type: none"> <li>understands the roles and responsibilities of all team members but uses them ineffectively</li> <li>participates in team discussions when required but does not actively seek input from other team members</li> </ul>	<ul style="list-style-type: none"> <li>integrates all members of the team into the care of patients, such that each is able to maximize their skills in the care of the patient</li> <li>efficiently coordinates activities of other team members to optimize care</li> <li>viewed by other team members as a leader in the delivery of high quality care</li> </ul>
<b>Assessing Milestone SBP1 as It Relates to In Basket Management:</b>		
<b>Critical Deficiencies</b>	<b>At Expected Competency</b>	<b>Aspirational</b>
<ul style="list-style-type: none"> <li>does not address in-basket tasks</li> </ul>	<ul style="list-style-type: none"> <li>responds to all results; does not always utilize an efficient messaging pathway; inconsistently documents patient communications</li> </ul>	<ul style="list-style-type: none"> <li>collaborates with nurses, administrative staff, peers and consultants in coordinating complex clinical issues</li> </ul>
<b>Assessing Milestone SBP1 as It Relates to Ambulatory Encounters:</b>		
<b>Critical Deficiencies</b>	<b>At Expected Competency</b>	<b>Aspirational</b>
<ul style="list-style-type: none"> <li>does not complete notes or orders</li> </ul>	<ul style="list-style-type: none"> <li>orders are signed and encounters are routed correctly to supervising attending</li> </ul>	<ul style="list-style-type: none"> <li>collaborates with nurses, administrative staff, peers and consultants in coordinating complex clinical issues</li> </ul>

Illustrative segment of curricular tool for teaching professional development and team roles while teaching the use of the electronic health record.