UHL Clinical Librarian Service

"bringing you the evidence"

Using SharePoint 2010 to manage guidelines and policies

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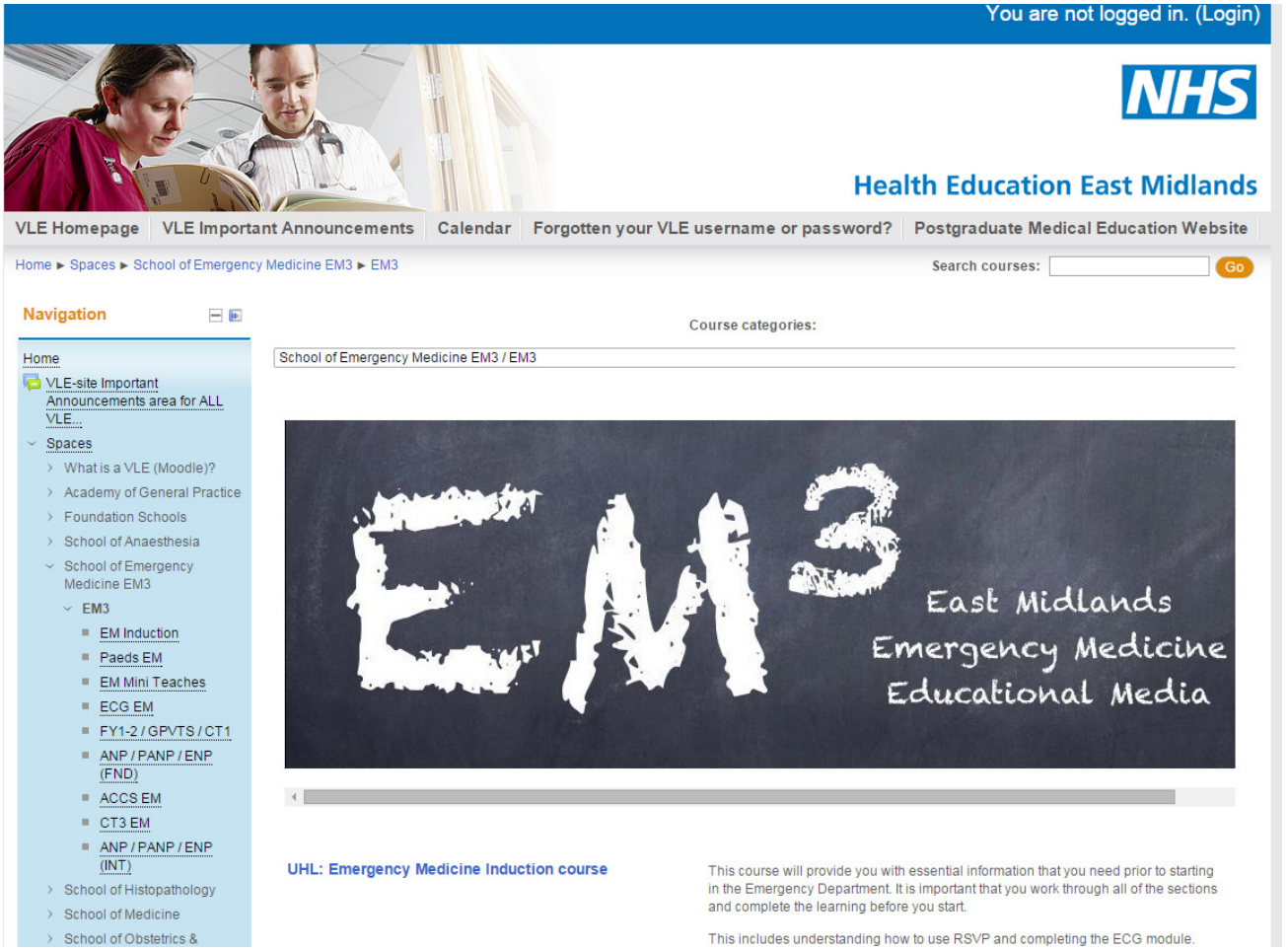
What I am going to talk about

- How I got involved in guidelines
- What the situation was in 2014
- How we proceeded
- How the current system works
- What we would do differently if we did it again…

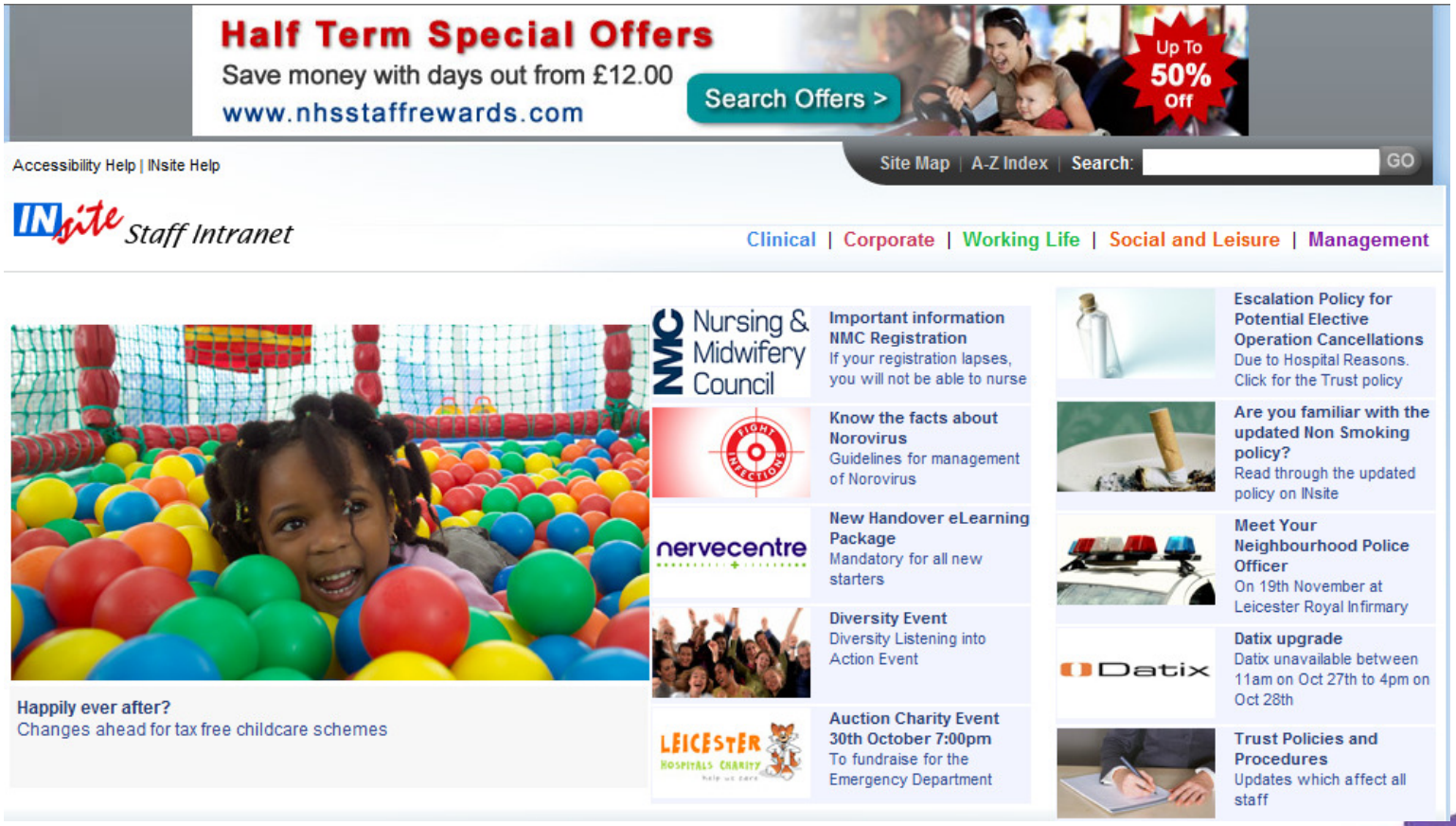
How this all started….

- A comparative case study of two models of a clinical informaticist service, Greenhalgh T. et al., BMJ, 2002, 324(7336):524-9.
- This study dates back to the year I started as a CL, it compares a CI Service that provides remote lit searching to an integrated CI who does lit searching but also does whatever it takes to make the evidence from the searches take that big leap into practice.
- The second model fitted my personality and the UHL service best and it was also the one of the two models that got ongoing funding…

ED Education Programme



Where you start looking: Our Trust Intranet site



When you searched this page

- Any document or webpage on the Trust's SP 2010 or SP 2007 accounts showed in the results.
- Multiple copies of documents were shown
- Titling was bad so the guideline you needed could be on page 3 of results below a pile of audits
- Staff lost confidence in the system and blamed SharePoint

What we did right..

- We built on existing good relationships – Steve and I had worked together for years
- A great champion
- Without Steve this project wouldn't have happened.
- Ideal position as working consultant (including ED shifts) and Chief Medical Information Officer
- He didn't take no for an answer, but always in a charming way.

And we had a great partnership with…

- Claire Stanley was our amazing companion in this adventure.
- Claire works in Clinical Quality and is incredibly supportive and welcomed Steve and I into the fun world of guidelines!
- At the start we felt that flying off a cliff was a big possibility
- We had no confidence in the software
- Steve got us contacts in the IM&T department and brokered meetings with all key senior staff, even involving the CEO.

Project

- Got link with external consultant that support the trust on SharePoint – Ascribe, now EMIS
- Got funding from IM&T for two days of consultant time to discuss what SP can do and to get staff in to find out what they would like their guideline interface to be like
- Got approval from all key players and funding to go ahead with a new separate access for UHL staff searching for guidelines and policies
- Project managed all the stages of developing the new Policies and Guidelines Library software (not a special bit of software but using the SP to deliver this function)

And what were our aims?

Our starting point

- We had most of our P&Gs in SP 2010
- They had most of the metadata we needed on them – document type, review date, Business Unit, Service area etc

What we needed

- Search results showing P&Gs only, not every document in the trust
- Good clear titles
- Reminders when reviewing needed
- Secure Archive area
- Submission area

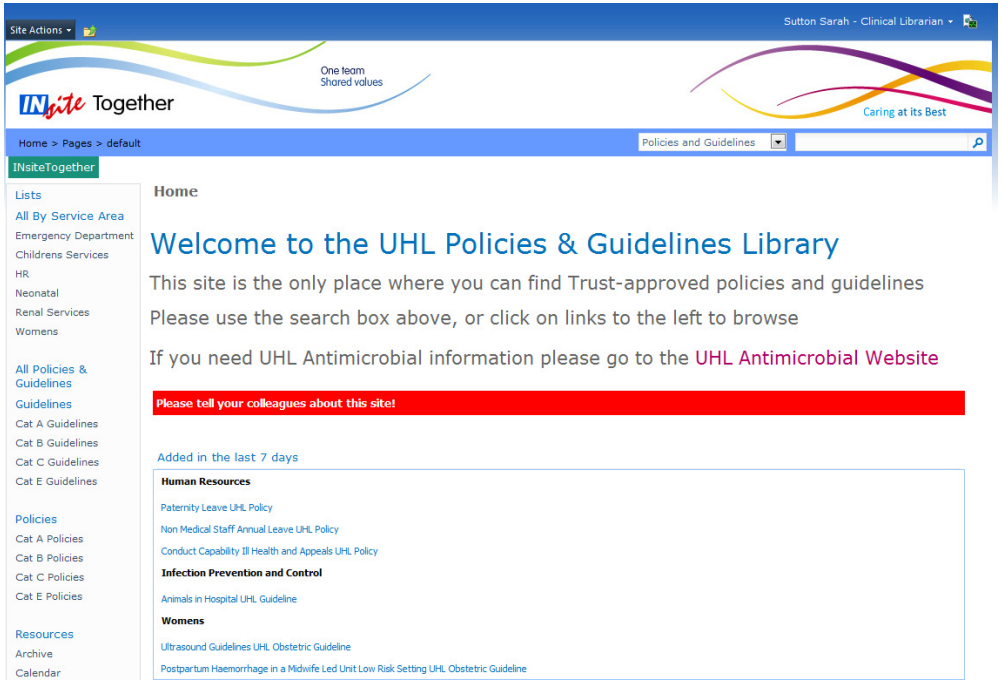
What went well?

- We didn't spend a lot of money on new software, we investigated the full potential o SP 2010 and then utilised it.
- Pre launch support from web team and graphics – why G and Ps on button?
- Rang Comms in the holidays
- PAGL actually fault free
- Some haggling with stake holders – added extra links, continuing support from EMIS
- Wonderful support from Library team and handy summer lull in searches
- The project raised the profile of the library in the trust – the Medical Director for the trust said that PAGL is light years ahead of our previous access to P&Gs

What didn’t go well

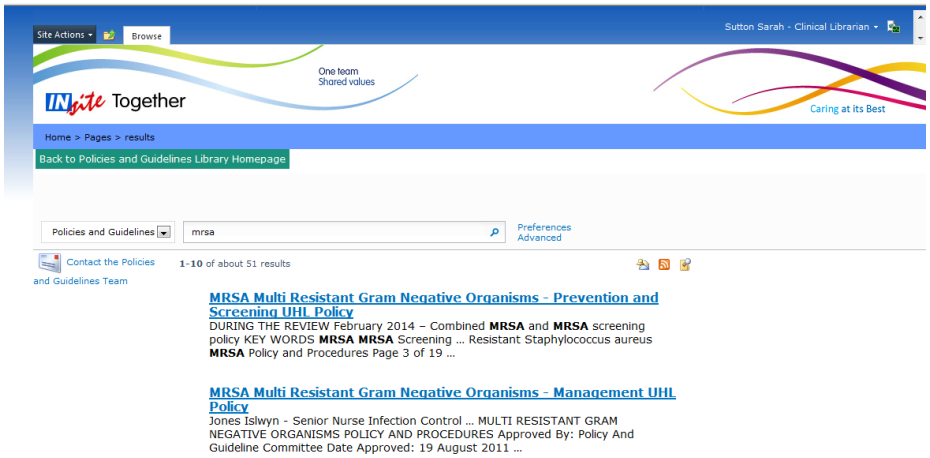
- Being a small team - I was unwell for two months and Claire wasn’t well either, so the project lost those weeks.
- We actually managed OK without complex planning charts and also filling in a lot project request forms for IM&T but there might have been benefits to doing both!

What it looks like



- Very Google like – we intend users to search for what they want, not work out what area it might be stored in
- SharePoint indexes based on what's in the actual document, its title and metadata.
- So doesn't need a lot of key wording to be effective. We can add terms if we find that key documents are being missed – this has happened once!
- Categories down the side are mostly used for management of the system ie Category A are trust wide documents, B are Business Unit wide, C are Service Area Wide and E are external guidelines or policies that the trust uses.
- Also some areas with a lot of guidelines or policies have a link to a title list, we chose some of these and others requested the link
- Our antimicrobial guidance is on another system see the large link to it near the top of the page

Results look like this



- We used a titling protocol to make finding the correct guideline easier
- We edited out icons and other metadata from the search results screen to make it easier to read
- Note the links back to the homepage and the Contact the Policies and Guidelines Team email
- We had 3,420 hits last month. 114 a day!

Summary

- SP 2010 provides a good way to manage P&Gs on the whole
- Use old and new friends on your project wherever possible
- Keep plugging away – it has taken me 13 years to have the access to P&Gs I thought we needed in 2002