

**Tracking of Diagnostic Tests and  
Consults in a Primary Care  
Resident Clinic:  
Role of a Tracking Log**

**Ann Rybolt MD**

**Margaret Calloway BSN**

**Roger Jones MD**

**Mukta Panda MD**



# **Why Ambulatory Primary Care Training?**

- **Continuity clinic ambulatory primary care training is a mandatory requirement for internal medicine residents**
- **This training should include management techniques in addition to academic and clinical medicine**

# Goals

**A policy for tracking diagnostic tests and consults was developed with the following purposes:**

- 1. model an effective, safe, patient care system**
- 2. ensure appropriate tracking of tests and consults**
- 3. develop an educational tool for residents which would be reproducible at their own practices**
- 4. enhance training in systems-based learning**

# **Methods**

- **A logbook was created and maintained for tracking**
- **Tracking is done by the RN daily**
- **Reviewed by a faculty member monthly for completeness**

# **Information recorded for each entry**

- **Entry Date**
- **Patient Name**
- **Medical Record Number**
- **Initials of person entering information**
- **Test or Consult Ordered**
- **Ordering Physician**
- **Date Test or Consult Scheduled**
- **Date Results Received**
- **Action plan with date and action from ledger**

# **Action plan with ledger**

- **If results not received within one week of scheduled date - call for results**
- **If test not done or appointment not kept - call patient, determine reason for “no show” and make new entry if test rescheduled**
- **Inform physician of abnormal results**
- **Attach results to chart, place in physician’s box**

# **Methods**

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# **Initial Problems with Creative Solutions**

## **1. Tests/Consults not entered**

**Personnel “taking off” the order enters the scheduled diagnostic test/consult in the log book**

## **2. Inconsistent and incomplete review of entries**

**Single staff made responsible for all follow-up including receiving results, identifying why results not received, and completing the action plan**

# Initial Problems with Creative Solutions

## 3. Incomplete understanding of value and importance of the tracking procedure

Procedure and specific patient problems that resulted from lack of completing the process reviewed with staff at monthly staff meetings

## 4. Inconsistent monthly review by attending

Bimonthly review realizing necessity of continued monitoring of critical procedures

# **Initial Problems with Creative Solutions**

## **5. Time requirements of process**

**Designate time for daily review and improve patient compliance with keeping scheduled appointments**

## **6. Consults and test results often not sent to clinic**

**Log book organized by provider to allow for easier requests for missing results**

# **Future directions**

- **Computerization of tracking system**
- **Unified medical record**

# Summary

- **Understanding the systematic nature of medical errors underscores the importance of analyzing and redesigning systems**
- **Development of non-punitive environments is needed for**
  - **safe and efficient patient practices**
  - **increased patient satisfaction**
  - **quality of work life**
- **Most medical education programs do not focus on quality risk management issues**

# **Conclusion**

**Our system attempts to help prepare physicians by teaching them systematic processes for comprehensive review that will enable them to practice more effectively in today's litigious and regulatory climate**