



THE AUSTRALIAN COUNCIL ON
HEALTHCARE STANDARDS

Piloting Patient Journey Survey Methodology for the ACSQHC

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Project Overview

- The result of a tender process of Australian Commission on Safety and Quality in Health Care (ACSQHC) for Piloting innovative accreditation methodologies:
 - patient journeys (RFT 008/0909)
- In conjunction with the Centre for Clinical Governance Research in Health, UNSW
- Commenced 8 October 2008 and concluded February 2009
- Involved observations from 18 surveys using the patient journey survey methodology

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Project objectives:

- To test the **Patient Journey Survey Methodology** as a method of assessing compliance with standards
- Explore success factors and barriers, effectiveness as part of an accreditation process and identify the potential of the method to improve the consumer focus in accreditation.

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Method

- Identified 39 organisations with scheduled onsite surveys in the timeframe (OWS & PR)
- Developed a process for selecting organisations that represented 7 different types – teaching hospitals; public and private metro; public and private regional; community services and stand-alone day hospitals
- 21 organisations selected to participate in the study
- 3 organisations declined the invitation to participate
- 9 surveyors recruited to the project
- Survey occurred over 1 day at the same time regular survey was held (in most instances)



Method

- Maximum of 3 records selected using individual records that met the following selection criteria:
 - Complex services
 - Crossing different services
 - Involving services aligned with specific criterion, such as infection control, medication management or blood components

- Tools developed:
 - survey assessment tool
 - guidelines for organisations
 - guidelines and education for surveyors

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Survey Results

- Independent surveys conducted concurrently (in most instances)
 - Data provided for 40 of the 45 EQulP criteria
 - 2 access criteria merged
 - 4 information management criteria merged to 1 criterion
 - Governance delegation criterion removed as not surveyable under the method
- Accreditation survey method reported 449 ratings
- Patient journey survey method reported 247 ratings
- Comparison of assessment level between both surveys on “matched” criteria
 - 180 ratings that were jointly assessed
 - 128/180 (71%) agreed ratings
 - 52/180 (29%) non-agreed ratings

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Organisation number	Patient Journey method assessment lower	Patient Journey method assessment higher
1	12	1
2	-	-
3	-	-
4	12	-
5	1	-
6	-	-
7	-	1
8	-	1
9	-	-
10	8	-
11	-	-
12	5	-
13	1	3
14	5	-
15	2	-
16	-	-
17	-	-
Totals	46	6

Survey Results (cont'd)

- ↘ EQulP Criteria which Patient Journey assessed
 - High degree of variability
 - Most effective in assessing mandatory (rather than non-mandatory) criteria
 - Within mandatory criteria, clinical criteria were more frequently assessed:
 - 8 (47%) surveys covered all 7 mandatory clinical criteria
 - 3 (18%) surveys assessed 6 mandatory clinical criteria
 - 4 (24%) surveys assessed 5 mandatory clinical criteria
 - 1 survey assessed 4 mandatory clinical criteria
 - 1 surveys assessed 1 mandatory clinical criteria

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Differences in Survey Ratings

- For 13 organisations insufficient data was collected by the patient journey survey team for an accreditation result to be determined

- Based on the assessment of the mandatory criteria :
 - 4 organisations did not meet accreditation threshold in both survey methods
 - The two methods agreed on the same organisation not meeting the threshold in one organisation

- Differences in the ratings between methods may result from factors other than the method alone:
 - Variation in surveyor perceptions
 - Less time available (perhaps less verification) in patient method
 - Only one perspective in Patient method (1 surveyor)

Evaluation Results

↘ Post survey evaluation (by interview)

- Organisations n=13 (77%)
- Surveyors n=5 (63%)

↘ Post survey evaluation (by questionnaire)

- Organisation participants (staff /consumers) n= 28/4
- Surveyors n= 8 (89%)

Interview Results

- Interviewing patients worthwhile for surveyors, organisations and patients
- Guidelines for organisations could have been clearer
- Timelines for preparation should have been longer
- More focus on patient care in the patient journey method was noted by all except in 2 instances
- Most agreed that the patient journey method focused more on policies and procedures
- Most staff reported being comfortable about participating in the patient journey survey method
- 83% of respondents agreed that the patient journey survey method added value to the accreditation process
- Patient journey method was supported by all as a good tool for evaluating patient care

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Questionnaire Results

- Majority of surveyors favoured the method
- 75% of surveyors found the guidelines helpful
- 75% of surveyors considered that the method focused more on patient care than the usual accreditation survey method
- All surveyors agreed that the method added value to accreditation
- Only 21% of organisational respondents believed the patient journey method should be used as a substitute to the usual accreditation survey method
- Over 60% of organisational respondents agreed the patient journey method should be used as an additional survey method
- No organisational respondents believed the method should not be used at all
- 58% of organisational respondents said that the patient journey method
- Patients most likely to report that the method would have more credibility with the

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Differences in survey methods

- ↘ *“You look at policies and procedures with both, but this is more specific, more focused. For example, with a stroke patient, I looked at clinical guidelines and compared them with what actually happened to the patient. This is a better way of looking at policies and procedures because it shows how they are actually followed” [Interview, Surveyor #1].*
- ↘ *“Doing the patient journey was actually an interesting and valid way to be assessed. It was far tougher than [the] usual accreditation” [Interview, Organisation #3].*

Conclusions

- Effective method for assessing clinical criteria but less so for support or corporate criteria
- Provides a more direct patient perspective
- Time consuming method that would mean sample size is too small for reliability
- More suitable as quality improvement (rather than accreditation) tool

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