Constructing Technology-in-use Practices: EPR-adaptation in Canada and Norway

Prepared for The Centre for Clinical Epidemiology & Evaluation. Vancouver General Hospital.

September 17, 2007

ACTION for Health

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- Report
- Draft
- Presentation
- Practitioner’s Pointers
- Briefing Note
- Research Tool
- Overview
- Other

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Constructing Technology-in-use Practices: EPR-adaptation in Canada and Norway

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Nina Boulus & Pernille Bjørn
Reference:


(This paper was also selected to be included in a special ITHC2007 issue of the International Journal of Medical Informatics)
1. Introduction

- **Electronic Patient Records (EPRs):**
  - Introduced in the 60s-70s
  - ‘Magic silver bullets’ → solve financial problems
  - Funded through national or provincial initiatives
  - $ + Expectations → High
    - Despite that, many goals have not been met yet
    - Therefore, research grounded in real case studies is highly important and can access the construction of alternative approaches
2. Setting the stage: Case studies

Case A: Norway

Case B: Canada

Aim of study: Investigate the driving forces that promoted the adaptation processes
2. Setting the Stage

- Similarities:
2. Setting the Stage

- Differences:
  - Institutional structures, organizational size, and technical architecture of the EPR system

- But:
  - Comparing the adaptation process in these 2 different settings, we have the opportunity to provide insights into the way in which technology-in-use practices develop and evolve over time
3. Research Methods

- **Longitudinal ethnography**
- **Fieldwork:**
  - **Case A:** Oct 2002 - 2003
  - **Case B:** Oct 2004 - Still in progress

Data collection techniques:

- Interviews (Case A: 19; Case B: 14)
- Observations (Case A: 14, 39 h; Case B: 10, 29 h)
- Formal & informal meetings
- Collection of various documents
- Training sessions (Case A: 5, 18h; Case B: 3, 4.5 h)
3. Research Methods

- Cross-case analysis:
  - Identify diversities and similarities between the management, execution, and impact of the reflective spaces
  - Identify technology-in-use practices

- Findings:
  - Meetings had different degrees of impact on the adaptation process in the 2 cases
  - Continuous reflection-on-practice activities
4. **Case A:** Technology-in-use practices:

- 1 day training
- Adaptation process: led by the IT department
- The same ‘go-live’ date for: physicians & secretaries
- Introductory meetings: conducted by the IT department
4. **Case A:** Technology-in-use practices:

### Initial Technology-in-use practices:

<table>
<thead>
<tr>
<th>Physicians:</th>
<th>Secretaries:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validating &amp; signing notes</td>
<td>Transcribing &amp; correcting notes</td>
</tr>
</tbody>
</table>

### Emergent Technology-in-use practices:

<table>
<thead>
<tr>
<th>Physicians:</th>
<th>Secretaries:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transcribing &amp; correcting notes</td>
<td>Creating templates</td>
</tr>
<tr>
<td>Partial use of prescriptions</td>
<td>Piloting scanning</td>
</tr>
<tr>
<td>Partial use of doctor’s notes</td>
<td></td>
</tr>
<tr>
<td>Retrieving information</td>
<td></td>
</tr>
<tr>
<td>Internal electronic referrals</td>
<td></td>
</tr>
</tbody>
</table>
4. **Case B**: Technology-in-use practices:

- 1 day training

- Adaptation process: led by the EMR committee:
  - Representatives from each professional group
  - Weekly meetings
  - Aim: discuss challenges, evaluate the transition process, and define new goals
4. **Case B**: Technology-in-use practices:

### Initial Technology-in-use practices:

<table>
<thead>
<tr>
<th>Physicians:</th>
<th>Secretaries:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering medical notes</td>
<td>Scheduling</td>
</tr>
<tr>
<td>Prescriptions</td>
<td>Billing</td>
</tr>
<tr>
<td>Search function</td>
<td>Scanning</td>
</tr>
</tbody>
</table>

### Emergent Technology-in-use practices:

<table>
<thead>
<tr>
<th>Physicians:</th>
<th>Secretaries:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering medical notes</td>
<td>Grooming &amp; updating the EPR</td>
</tr>
<tr>
<td>Retrieving information</td>
<td>Scanning</td>
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<tr>
<td>Prescriptions</td>
<td></td>
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<td>Search function</td>
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<tr>
<td>Billing</td>
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<tr>
<td>Referrals</td>
<td></td>
</tr>
<tr>
<td>Creating templates</td>
<td></td>
</tr>
<tr>
<td>Visual graphs &amp; diagrams</td>
<td></td>
</tr>
<tr>
<td>Scanning</td>
<td></td>
</tr>
</tbody>
</table>

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4. Cross-case analysis

- Technology practices evolved in both cases

- But the extent to which the work practices changed was different
  
  - **Case A:** Developed technology-in-use practices over time
  
  - **Case B:** Developed greater amount of changes and increased use of EPR
4. Cross-case analysis

- What are the factors promoting the adaptation process?

- One of the major driving forces in Case B was the establishment of the EPR committee and their meetings.
5. Discussion

<table>
<thead>
<tr>
<th></th>
<th><strong>Case A</strong></th>
<th><strong>Case B</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>EPR meetings:</td>
<td>IT department</td>
<td>EPR committee</td>
</tr>
<tr>
<td>Decisions:</td>
<td>Challenging</td>
<td>Continuous discussions &amp; negotiations</td>
</tr>
<tr>
<td>New function:</td>
<td>Struggle with workload</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source of change:</td>
<td>External (IT department)</td>
<td>Internal (health care personnel)</td>
</tr>
<tr>
<td>Approach:</td>
<td>‘Top-down’</td>
<td>‘Bottom-up’</td>
</tr>
<tr>
<td>Participants:</td>
<td>Randomly chosen</td>
<td>Self-selected</td>
</tr>
<tr>
<td>Frequency of</td>
<td>At the beginning</td>
<td>Weekly basis (then biweekly &amp; monthly meetings)</td>
</tr>
<tr>
<td>EPR-meetings:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5. Discussion

Case B:

- Content of meetings:
  - Continuous reflection-on-action activities
  - Technology-in-use practices emerged from situated actions
  - Space to engage in critical debates and question existing rigid routines.
5. Discussion

- Introduction of new functions:
  - **Case A:** Discussed in isolation
  - **Case B:** Evaluated in context

- View of the technology:
  - **Case A:** Time-demanding & disrupting
  - **Case B:** Embedded in the medical practice and enhances quality of care
6. Concluding Remarks

Our findings lead to the following recommendations:

- Change should be internally initiated
- Space for reflection-on-practice
Thank you for listening!

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