

A close-up photograph of a doctor in a white lab coat. The doctor's stethoscope is visible around their neck. They are holding a silver pen over a clipboard on a wooden desk. The background is a blurred clinical setting with a blue chair and a potted plant.

# Facilitation Guide for Implementing BD Primary Care Point of Care Testing

**December 2023**

# How to Use this Facilitation Guide

Primary Care practices looking to embed Point of Care Testing into their clinic workflows require collaborative team based care planning to support designing, testing and implementing processes to support Point of Care Testing within their specific clinical contexts.

This guide has been developed based on learnings from implementing POCT within primary care practices to support new teams with streamlining their POCT planning processes.

It is suggested teams interested in POCT use the guide to support collaborative planning conversations with key clinic staff.

# POCT FACILITATION GUIDE CONTENTS:

This guide has been developed to support clinic conversations & planning for implementing POCT in primary care

● Patient Journey Mapping

● Patient Identification / Clinical Information System

● Decision Support

● Delivery System Design

● Patient Self Management

● Community Resources and Policy

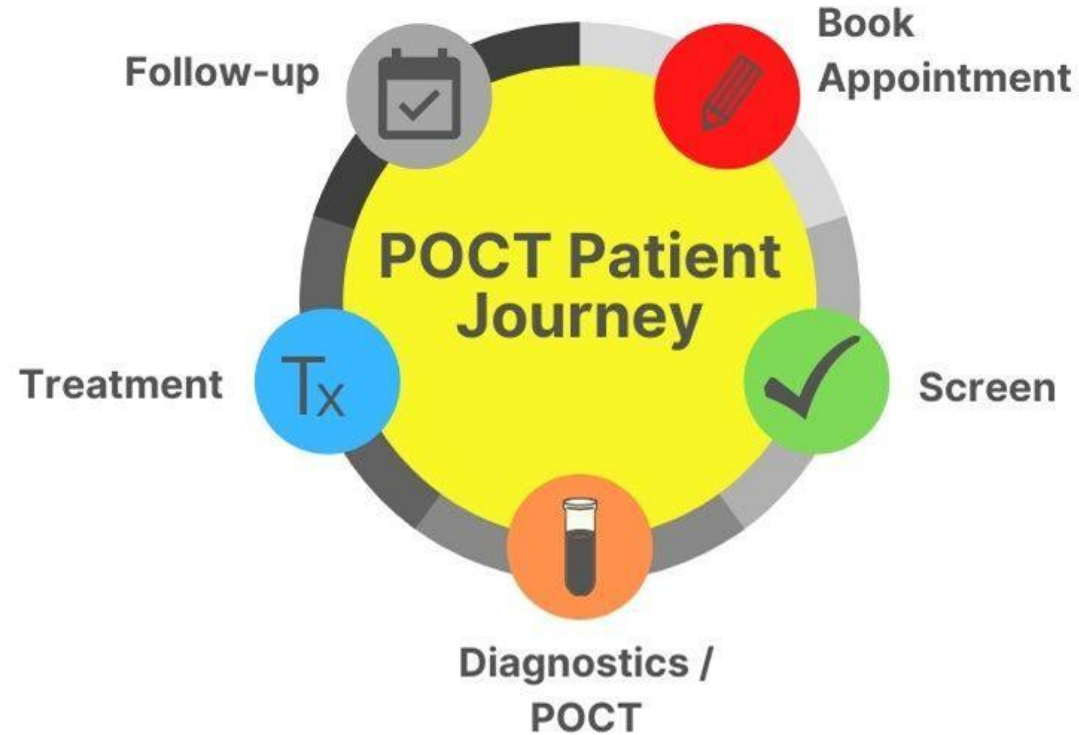
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● Chronic Care Model

● Patient Medical Home

# Patient Journey:

*Mapping the patient and providers journey within primary care for POCT*





# Patient Identification / Information Systems

- ❖ How does the clinic identify patients that should have a POCT? (e.g. flag at time of booking based on symptoms etc)
- ❖ Does clinic optimize waiting time to complete symptom survey, vaccinations status etc.?
- ❖ Patient Profile in EMR- can the clinic quickly identify profile of patient- age, vaccine status, comorbidities?
- ❖ How does the clinic consistently record the POCT so they can query the information in a systematic way? How many tests have they done? How many positive tests have they had? How many of each virus type have been completed (COVID, Influenza, RSV etc)?



# Decision Support

- ❖ How is the clinic making decisions (e.g. who will order POCT tests)?
- ❖ How would staff be trained for POCT testing?
- ❖ Who will conduct the POCT and who will analyze the test?
- ❖ How do we ensure the HCPs in the clinic understand the usefulness and value of the POCT for the patient and for the physician?



# Delivery System Design

- ❖ What is the clinic system for delivering care?
- ❖ Does the clinic have a nurse or other staff members who will be involved in the POCT?
- ❖ Will the MOA or reception play a role?
- ❖ Is there a process in place to keep the symptomatic patient isolated from other patients?
- ❖ Who will order the test?
- ❖ Who will conduct the test?



# Delivery System Design

- ❖ Who would analyze and report the findings?
- ❖ Who would communicate the results to the patient?
- ❖ What are the next steps for a positive/negative patient?
- ❖ Who records the findings of the POCT in the EMR?
- ❖ Is there any communication that has to go to the provincial labs?
- ❖ Is there any follow up with the patient after they leave and who conducts the follow up?





# Patient Self Management

- ❖ Are the patients aware that POCT exists in this clinic?
- ❖ Does a patient understand what symptoms qualify for a POCT?
- ❖ If the patient is positive, is there education the patient will receive about their diagnosis (COVID positive, Influenza positive etc)?
- ❖ Once home, is the patient aware of how to manage their symptoms and protocol for isolating at home etc?



# Community Resources and Policies

- ❖ Are the local labs aware of the clinic's ability to conduct POCT?
- ❖ What is the communication with the clinic and local public health units and pharmacies?
- ❖ Where else in the community is conducting POCT?

# Primary Care Patient Journey Mapping with POCT Example

## Patient Booking

- Patient calls
- Patient reports symptoms
- 10 minute appointment booked under **“flu like symptom”** appointment type
- Patient masked for appointment
- Patient roomed by LPN

## Patient Assessment

- Symptom checklist is posted in appointment room and near POCT
- Patient history taken
- If appropriate symptoms present - LPN performs swab and prepares POCT
- Nurse masks for patient assessment
- Patient waits in appointment room during POCT
- Patient remains masked

## Point of Care Test

- Instructions for each POCT are posted near analyzer and assays
- LPN prepares assay
- Wait for results (5-15min)
- LPN views test result
- LPN Documents results (on paper & “lab entry” in EMR)**
- LPN communicates results to physician

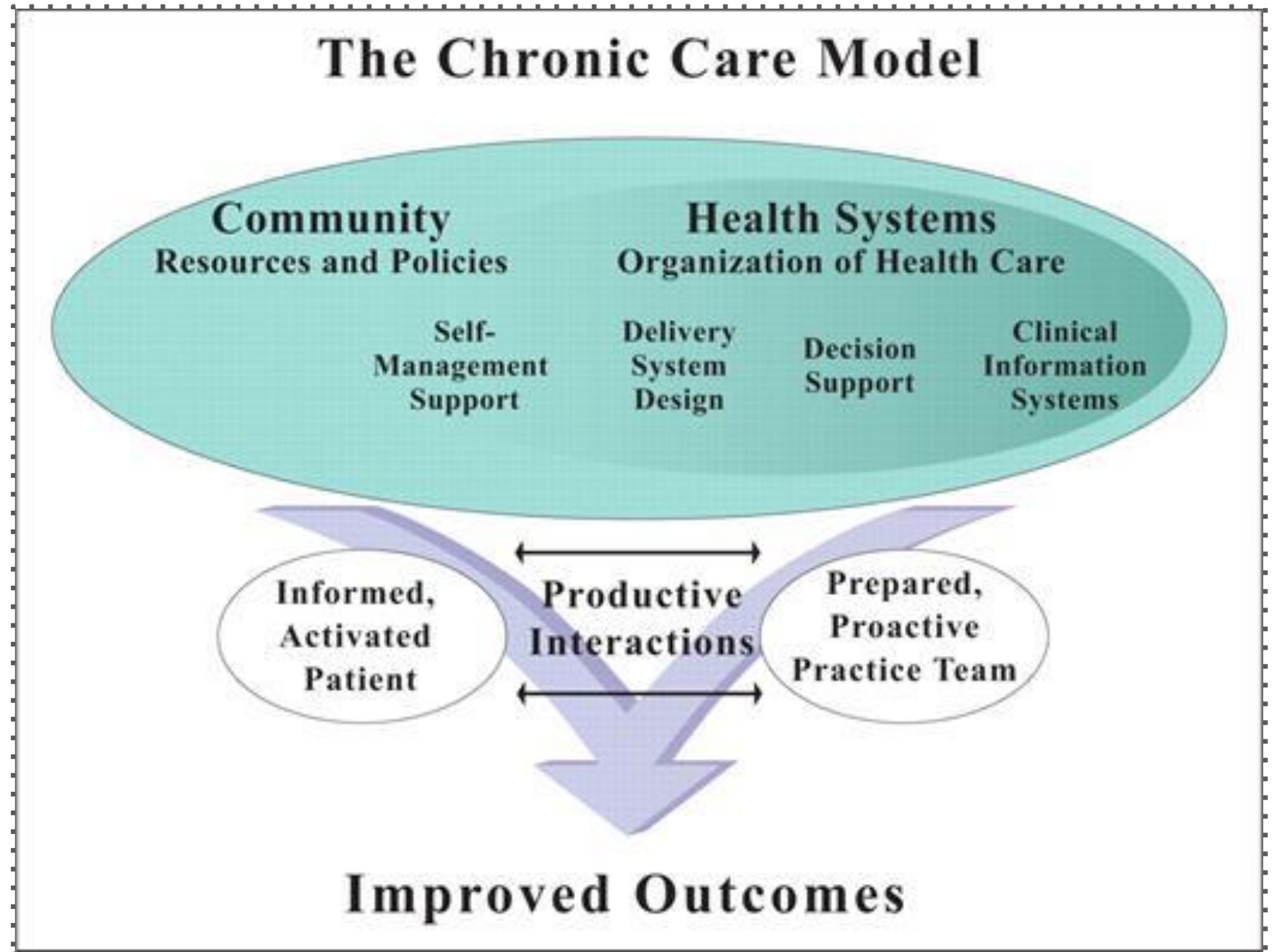
## Diagnosis/Treatment

- Physician communicates results to patient
- RX given to patient *if appropriate*
- Instructions given to patient (e.g. symptom management /isolation)
- Patient asked to book a follow up appointment *if appropriate*
- Patient completes patient survey**
- Physician & nurse complete survey**

# Appendix

# CHRONIC CARE MODEL:

Factors influencing high-quality chronic disease management & optimized patient outcomes



# Patient Medical Home:

A model of care where patients feel most supported in their primary care needs and are supported by a connected, interdisciplinary care team.

## Patient Medical Home Pillars

