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### **Case Study: The end of the Yellow Book?**

Southend Hospital NHS Trust in Essex operates two separate test systems for its 3,000 Anticoagulant patients.

Kevin Oakley, Deputy Manager of the Haematology Laboratory has provided an overview of the systems in use and his views on which is more efficient.

The first system is the traditional Outpatient finger prick clinic blood test with dosing information recorded in the standard HMSO Anticoagulant "Yellow Books".

The second system allows patients to be tested at community phlebotomy sites with their blood tests being sent to the central laboratory site for testing. This service has proved very popular with patients and now accounts for the bulk of the workload. Patients tested in the community were asked to send their Yellow Books to the laboratory to be updated each time a test was performed.

The Pathology Department at Southend Hospital is similar to many others around the country, as over a period of several years, patients have been transferred to the community system leading to vast numbers of Yellow Books being received in the laboratory to record test results for Warfarin users.

Kevin Oakley said: 'As the service grew, several audits were completed. These identified a number of weak points in the community system:

- The patients preferred to hold onto their book as they were told that it was important to carry it with them at all times.
- Books repeatedly disappeared in the post.
- Each book had to be manually updated with a 'sticky label' containing the new test information. This manual process was open to transcription errors.
- The manual handling of large numbers of books in the laboratory was a logistical problem. The books were prone to sticking together or folding inside one another.
- The passage of books through the laboratory gave rise to issues of contamination.
- Each book required enveloping upon completion, for return in the post.
- Yellow Books were frequently out of date, particularly following inpatient treatment.

Following a contact from EACS, who are specialists in Document Management Systems, we took the opportunity to design a completely new system, which did not require the Yellow Books. With help from EACS a blank A4 self-sealing letter was designed.

This had to include room for several items:

- A return address.
- Details of the test that had been performed, along with a "potted" history of previous tests.
- A detachable personalised request form to be sent with the next test performed. This had to include space for the patient to convey any changes that may have occurred to their therapy or personal situation.
- Instructions on how to use the letter.

A 'z-fold' format was designed, enabling all of the patient data to be printed on one side of the sheet leaving the reverse of the form to be used for statutory information.

EACS provided help in how best to fit this information in the available space. It was also decided to keep the design of the pre-printed portions as simple as possible allowing flexibility for change in the future. Once printed, these letters are fed into a pressure sealer supplied by EACS (a small appliance about the size of a modern PC printer) where they are folded and sealed automatically, and then sent straight in the post.

The decision not to use the Yellow Books left us with a requirement to provide patients with something to carry with them in place of their booklet; something that they could show to any health-care professional that they saw and which explained their medical condition.

Further discussions with EACS led to the design and development of another A4 document. This was formatted to mimic the Trusts' standard headed paper but incorporated a credit-card-sized "peel-off" card on which the patient's personal and treatment details could be printed.

Once the designs and layouts had been agreed, both documents were introduced after a mailing campaign, informing our patients of the proposed changes.

Our maximum inter-appointment interval is 12 weeks, so for the 12 weeks preceding the introduction of the new system, every test was returned with an information sheet regarding the imminent changes.

There were immediate benefits following the introduction of the new system:

- The patients could keep their new card with them at all times.
- Pre-printed, personalised request forms were received in the laboratory. These were always clear to read, easily filed and did not need to leave the laboratory environment once received.
- The test information letters despatched to patients were always clear and contained an up-to-date history.
- The test information letters did not require manual intervention (no sticky labels) eliminating transcription errors.
- There was no enveloping of external mail, which resulted in a huge time saving.

The system has been enhanced since its initial introduction providing further benefits:

- The introduction of software upgrades has improved the quality and clarity of the information printed.
- A cross-check system has been introduced to ensure that everyone tested receives the relevant letter.
- Bar codes can be printed on the letter to enable scanning of the document when the patient returns for their next test, bringing up all their details instead of manually finding them in the system.
- EACS have also developed the idea of having a peel-off label on the form to stick on to blood samples when taken. They believe this will aid cross-checking and avoid further identification errors.

Kevin Oakley concludes "As the Project Leader of this system from EACS, the Haematology Laboratory at Southend Hospital NHS Trust believe the new system to be quicker, safer and more efficient than any we previously used. I highly recommend this company's products for other hospitals that wish to modernise and improve their efficiency."

Isn't it time you updated the Yellow Book System?

If you would like to see how this system can help you to save time and money or would like to see some samples? Please contact us for an information pack.