Training and Review Tasks

USING A WORKFLOW TASK FOR QUALITY CONTROL AND TRAINING

Proposal

Create a new SEER*DMS task and workflow to facilitate **training** and **continued education** of central registry staff.

The new Review Task would **automatically trigger a second review** of select cases as they are completed. A second registrar would review the coding and provide feedback.

The case would go back to the original registrar so that they can **learn from their trainer, manager, or peer**.

Purpose

New registrars would receive **positive and constructive feedback** from their trainer while they still remember details about the case.

Experienced registrars would receive feedback from peers or managers; this would be especially helpful when **new coding rules** are employed.

Case Selection

The selection criteria can be based on any data items. These are just examples:

- Registrar
- Cancer site and morphology; or SEER Site Recode
- Year of Diagnosis – a higher rate of review is required when new data standards go into effect.
- Any other field…

Case Selection – Sample Rules

These are being presented as examples only. We do not need to define rules today – just want to understand the potential

- Review every Consolidate and Resolve Patient Set Errors task completed by **novice registrars**.
- Review X cases per day/week/month completed by **experienced staff**. Prioritize the selection based on site and year of diagnosis.

Workflow

Task

- Registrar completes standard Consolidate or Resolve Patient Set Errors task. Task is complete when all records are consolidated and all edits resolved.
- The registrar does not know whether this task will be selected for review or not.
- Registrar can submit the task for review if they have questions (required to enter a comment or question).

Review

- A new, review task is created and auto-assigned. Auto-assignment rules might be based on registrar or type of case.
- Experienced registrar reviews the work completed by the registrar.
- Details to be discussed in Q&A segment. Reviewer might make changes; or might send comments back; or a list of fields for the trainee to re-think.

?

Return

- Task is returned to the original registrar.
- The registrar confirms that they read the comments; and they may make changes that would go back to reviewer.

Types of Feedback and Errors

- Trainer can add field, case, or patient level comments.
- To facilitate reporting, feedback could be categorized:
  - Positive feedback and confirmation of the registrar’s progress
  - Instructive comments
  - Major Coding Error (e.g., miscoded site where first 3 characters are wrong)
  - Minor Coding Error (e.g., last character of the site code is wrong)

Permissions – Access to Review Info

The trainer’s comment and the registrar’s responses will only be visible to the trainer, the registrar being evaluate, and managers.

New permissions would be created…..something like:

- Training – can complete review tasks; can see comment
- Training management – see all comments made by the registrar and the reviewer

Tracking & Management

The design must include reports and other mechanisms to track training tasks and registrar progress.

Next Steps

1. Gather additional requirements today.
2. NCI and IMS will evaluate and consolidate findings from today.
3. IMS will develop a phased solution (e.g., short term vs long term). This will include more detail than what we discuss today and will include an estimate of the level of effort.
4. NCI will review the proposal and consider priorities.
5. The proposal will be sent to the registries for review.
6. Conduct a more detailed review in a full CCB meeting.
7. Iterate….

Questions

1. Registry roll call.   The details need to be worked out but, in general, do you think that your registry would benefit by the development of this new review task?
2. Could we define a comprehensive solution that is deployed in phases? The first phase would have the infrastructure to support the long term vision, but may not have all features. Features would be added in a later version.
3. The basic workflow is Registrar Completes Task -> Trainer Reviews -> Return to Original Registrar. The task ends at that point. Would you ever want the original registrar to be able to respond? Seems like it could lead to an ongoing debate between registrar and trainer.
4. What does a reviewer need to see when they do the review? A registrar completes a Cons or RPSE task. The task goes forward for review. Is it enough to review the audit log or does the reviewer need a different view of changes made by the registrar.