PROCEDURE:	**Adopting Shared Health Standard Operating Procedures (SOPs) or Guidelines**
Program Area:	**Acute Care**
Section:	**General**
Reference Number:	**CLI.4510.PR.003**
Approved by:	**Regional Lead - Acute Care & Chief Nursing Officer**
Date:	Issued 2024/Jul/03
	Revised yyyy/mmm/dd

PURPOSE:

To ensure a consistent approach is taken when adopting Shared Health standard operating procedures (SOPs) into Southern Health-Santé Sud (SH-SS). Engaging in a consistent process each time will facilitate a smooth roll out of the new SOP/guideline, with the goal of staff feeling supported and knowledgeable with the new content to ensure safe delivery of patient care.

IMPORTANT POINTS TO CONSIDER:

As a result of Health System Transformation, Shared Health has taken the lead on numerous clinical projects, standard and guidelines. These guidelines have been created in partnership with clinical leaders from across Manitoba (Provincial Clinical Teams) as part of improving access to quality care and patient outcomes. While it is important to have a consistent provincial approach, it is recognized there are service delivery organization (SDO) specific nuances that need to be considered when adopting a Shared Health SOP and/or guideline into SH-SS.

SH-SS representatives who sit on Provincial Clinical Teams (PCTs) prioritize communication on an ongoing basis with Acute Care program areas relevant to topic so that there is awareness of current priorities, in order to avoid duplication of work and to ensure the implications of roll out in SH-SS are considered.

PROCEDURE:

1. Formal communication from PCT member to relevant SH-SS Program group outlining scope of work and sharing of resources while following CLI.4510.PR.003.FORM.01 Adopting Shared Health Standard Operating Procedures (SOPs) and Guidelines Checklist.
2. Develop a SH-SS Policy (PL), Procedure (PR) or Specific Guideline (SG):
   a. Assemble Working Group (WG) (involve existing Program Policy Working Group (PWG) if in place).
   b. Identify key stakeholders for involvement in WG:
      i. Those with relevant experience and knowledge of the topic at hand, and/or
      ii. Clinical representation for the front-line staff.
      iii. Representation from other programs involved:
         1. Staff Development (educators),
         2. Pharmacy,
         3. Community Programs,

4. Long Term Care, and/or
5. Clients and families (if relevant).
3. Working Group – PL, PR or SG Development
   a. Follow Policy, Procedure, Standard Guideline, Supporting Document and Form: Development and Approval Process ORG.1010.PL.005 and Policy, Procedure, Standard Guideline, Supporting Document and Form: Development and Approval Manual ORG.1010.PL.005.SD.01 and ensure compliance with approval process, formatting and branding standards. Including use of templates and worksheet.
   b. Review and compare Shared Health SOP with current SH-SS documents and update accordingly. In some cases, the SOP may be adopted in entirety if no current SH-SS document exists. *Take into consideration how the SOP will be used in SH-SS, available resources, organizational structure, staff readiness/competency with the topic. Review and update relevant documents below:
      i. Forms,
      ii. Order sets,
      iii. Algorithms, and/or
      iv. Other supporting documents.
   c. Ensure documents follow the development process (as identified above) and review by relevant stakeholder groups including:
      i. Program teams (i.e. Obstetrics, ED Council, Surgery, Medicine-Rehab, Infection Prevention & Control, Wound Care, Dialysis),
      ii. Other Programs outside of Acute Care (Personal Care Homes, Palliative Care, Community Mental Health, Primary Care, Public Health, Home Care, etc.),
      iii. Pharmacy &Therapeutics (P&T),
      iv. Regional Medical Advisory Committee (RMAC), and/or
      v. Staff Development.
4. Approval and Publishing
   a. Once approved at program level, documents are sent to Chief Nursing Office (CNO) for approval.
   b. After CNO has reviewed and approved, Executive Assistant or administrative support publishes per usual process.
   c. Formal communication occurs via Policy Update.
5. Communication and Roll Out Strategy – Develop plan for how the process change will occur within SH-SS, being mindful to include principles of change management and adult learning.
   a. Staff Development Team develops education plan for staff education (if applicable).
      i. Prepare education documents, utilizing Shared Health educational resources if provided.(i.e. Self Learn Package, PowerPoint, MS Forms etc.)
      ii. If no formal education strategy is required (ie 'read only' changes) PWG will complete a CLI.4510.PR.003.FORM.02 Briefing Note Template while referencing the

      CLI.4510.PR.003.SD.01 Briefing Note Example which will be linked in the Policy Memo.
         1. Briefing Notes will provide an over view of the key changes in the policy as well as any action items required at the site level (ie print and replace forms).

   b. Determine details for roll out:
      i. Education,
      ii. Target audience,
      iii. Desired participation rates (i.e. 80%), and

iv. Go live date.
c. Communicate via Policy Update and Clinical Update, Staff Communique or other existing communication platform/process.
d. Approval and publishing of policy matches education timeline and 'go live' date.
6. Evaluation - Ensure evaluation and feedback are reviewed after roll out, and is monitored by Staff Development.
a. Significant findings are brought to the attention of the relevant program group for review and consideration.
7. Ongoing
a. PCT members ensure updates from Shared Health are received.
b. Maintenance of documents on SH-SS policy page is ongoing by relevant Program Group.

SUPPORTING DOCUMENTS:

CLI.4510.PR.003.FORM.01 Adopting Shared Health Standard Operating Procedures (SOPS) and Guidelines Checklist
CLI.4510.PL.003.FORM.02 Briefing Note Template
CLI.4510.PL.003.SD.01 Briefing Note Example

REFERENCES:

Shared Health – Provincial Clinical Planning Provincial Clinical Planning - Shared Health (sharedhealthmb.ca)

Shared Health – Projects, Standards and Guidelines Projects, Standards & Guidelines - Shared Health - Health Providers (sharedhealthmb.ca)

ORG.1010.PL.005 Policy, Procedure, Standard Guideline, Supporting Document and Form: Development and Approval Process
ORG.1010.PL.005.SD.01 Policy, Procedure, Standard Guideline, Supporting Document and Form: Development and Approval Manual