Using Tracer Methodology in Clinical Setting and Research to Measure and Improve Quality

Quality in healthcare systems is defined from different viewpoints and there are many methods to measure quality in health care[1,2]. The Joint Commission on Accreditation of Healthcare Organizations (JCAHO) in 2004 used a new and highly improved accreditation process: Shared Vision—New Pathways, as a “tracer methodology”[3]. The tracer methodology is a significant component of the improved accreditation process, providing a framework for Joint Commission assessment to assess compliance with standards of care during on-site surveys. This process means that assessors spend more time observing the direct care[4]. In the tracer methodology, the assessors choose a patient and use that medical record as a roadmap to evaluate the care delivered by the healthcare system. This includes not only the patient services but also the interaction of sectors, programs, and functions throughout the healthcare system[5].

During tracer methodology evaluation, the following areas are surveyed:
- Eligibility with Joint Commission International (JCI) standards and National Patient Safety objectives
- Consistent subordination to organization policy and consistent implementation of procedures
- Communication within and between sectors/services
- Employment ability for doing tasks and workload capacity

The physical environment as it relates to the safety of patients, visitors, and staff[6].

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<td>Joanne Iggles and et al[9], 1980</td>
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<td>Burns, multiple trauma, head trauma, spinal cord injury, and low birth weight infants</td>
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<td>Durán-Arenas and et al[10], 2012</td>
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<td>Lai and et al[12], 2003</td>
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### Types of Tracers:

- **Individual tracers:** Individual tracer, usually contents observing care, treatment, or services and associated processes; reviewing all medical records related to patients, treatment, or services and other processes, as well as survey other documents and interviewing staff.

- **System tracers:** This tracer relates to a high-risk system or the processes in an organization. Currently, these topics are evaluated during the on-site assessment using this approach: medication management, infection control, and data management.

- **Program-specific tracers:** In these tracers focus on specific pertinent to a particular accreditation program and the associated care, treatment, or service processes. These processes are evaluated using the experience of patients who has needed for the organization’s care, treatment, or services[7].

### Steps of tracer methodology:

1. Team making, educating team members
2. Planning tracer process
3. Implementing the tracers
4. Using and understanding data from tracers
5. Determining and implementing improvements based on tracer data
6. Retracing the steps[8].

In recent years many studies conducted using tracer methodology in clinical setting, some of these studies are summarized in Table 1.

As can be seen in Table 1, tracer methodology has been used in different areas and goals of clinical setting and research. In conclusion, Tracer methodology is a flexible and effective
management tool that allows an organization to assess and closely examine its systems and process of care delivery and also the planning to improve the quality. Moreover, this method can be implemented in accreditation and clinical governance programs.

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References:


