Using Smartsheet® to track, support, and document resident QI activities
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Introduction
In early 2020, personnel involved with the Anesthesiology Department’s quality assurance, residency, and research programs convened in an effort to address two pressing concerns.

One of these was that Quality Improvement (QI) activities by residents had a tendency to begin well, with real enthusiasm and smooth progress, but then gradually lose priority as the pressures and obligations of residency won out.

ACGME also announced expectations of demonstrated QI competence among residents, and included QI presentations among the categories that can meet program requirements for faculty.

Conveniently, UNM SOM now emphasizes QI as an element considered for faculty promotion.

The department needed a way to ensure both progress and documentation, and settled on a project-management software platform (Smartsheet®), with launch in May 2020.

We have multiple projects ongoing, but tracking has been an issue

- Smartsheet Tracker
- Routine reminders and updates

NOT mean to be a policing activity

- Organize department activities for reporting purposes
- Generate timely reminders for investigators
- Ensure resident participation in quality improvement activities
- Encourage participation of others in quality improvement activities through organized central repository of ongoing projects

Project Intake
A QI team leader can register a project through an online form (partial figure below), or by contacting the relevant department staff.

- Links to the form can be shared on department websites, by QR code, by email, etc.
- The online form allows entry of basic relevant information, as well as upload of a project plan (e.g. PDSA)
- The system can be set to automatically email the coordinator with an alert about the new entry
- The coordinator can then review the project plan and provide advice and resources as appropriate

Engagement
The system allows the creation of reports with live and interactive content. One such report is widely shared on relevant department websites. It includes:

- A live count of active projects and their status
- Contact info for the mentor/coordinator
- A list of active projects’ titles
- Another path to access the project intake form
- Links to relevant resources

The system’s core spreadsheet (partial)

Reports
Reports can also be created to serve the needs of specific constituents, with controlled access. Examples in use by Anesthesiology include:

- Lists of projects by resident and cohort
- Lists of projects by faculty mentor
- Date of most recent contact
- Department-imposed deadlines
- Residents without an active project
- Projects with impending lead-resident graduation, needing handoff to a junior resident
- Candidate projects for official department metrics
- Projects flagged for extra attention (slow progress, administrative hangups, etc.)

Fine-grained iterative process

- Platform capabilities, user awareness and expectations, and specific details of a given setup interact dynamically
- Regular meetings of the QI management group result in frequent tweaks to meet identified needs
- The core spreadsheet has changed gradually but substantially from its initial configuration, and continues to develop