Opportunity Knocks

Utilizing Safety Reporting data during EHR (Epic) implementation to drive improvements in Hospital Patient Safety

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Introduction

Initial Opportunities: *Patient Safety planning during Pre-Implementation phase of Electronic Health Record (Epic) conversion*

Second Wave Opportunities: *Patient Safety during ‘Go Live’ Months: Using data to support changes and improve Safety*

Ongoing Opportunities: *Continue the focus on Patient Safety*
• 162 bed Community Teaching Hospital in Boston, Massachusetts
• Community Teaching Hospital of Brigham and Women’s Healthcare
• Member of the Partners Healthcare, Inc. Network
On May 30, 2015, Brigham and Women’s Health Care family went live on the EPIC system

- All inpatient and ambulatory areas including an academic medical center, community hospital, specialty medical center (Dana Farber Cancer Institute), 2 ambulatory care centers and over 160 ambulatory practices
- 18 revenue cycle and clinical applications
- 13,500 users trained
- 13,000+ workstations
- 487 seats in command center
- 1,400+ biomed devices
- 1,500 super users
PLANNING GROUNDED IN LITERATURE REVIEW

► Benefits of a Review
  • Many robust sources exist to provide themes of patient safety issues and frame risk points for your organization
  • Helps target staff education, support resources of the organization
  • Provides clarity and focus for the patient safety team
  • New EHR implementation may be a singular career event for Organization Leaders

► Senior Leadership/C-Suite Support for Patient Safety

► Essential Literature to frame known Risks and potential Problems
  • HealthIT.gov Office of the National Coordinator for Health Information Technology: Safer Guides
  • Jointcommission.org resources:
  • Sentinel Event Alert 54: Safe use of health information technology
  • Sentinel Event Alert, Issue 42: Safely implementing health information and converging technologies
  • IOM: Health IT and Patient Safety: Building Safer Systems for Better Care
A review of literature (IOM Health IT and Patient Safety) and Epic identified issues framed review of risk concerns at the Enterprise and local level.

### Centralized Activities
- **Partners Enterprise**
  - See Something, Say Something
    - System wide focus on Patient Safety
  - Clinician Newsletters
  - System plan for Reporting an Issue
  - Webinars
  - Collaboration across the Group 1 Sites

### Site Specific Activities
- **Site Safety Leads**
  - Local Education campaigns
  - Weekly Newsletter, Staff feedback
- **Safety Analytics**
- **Presence in the Command Center**
- **Collaboration with Organizational Readiness**
  - Workflow mitigations
EDUCATIONAL PLANNING FOR STAFF

Q: What are the essential questions that we need to answer to prepare staff to address Patient Safety issues during this time of organizational change?

► How do we engage staff to report patient safety issues at a time when they will be very busy and potentially distracted?

► How do we support and encourage reporting?

► What kind of information about risks would be helpful to line staff to prepare for implementation?
SEE SOMETHING, SAY SOMETHING CAMPAIGN

SEE SOMETHING? SAY SOMETHING!
MAKE PATIENT SAFETY YOUR PRIORITY.

Extra vigilance is required to ensure we provide the safest care for our patients as we become familiar with Partners eCare, our new Epic-based system and workflows.

COMMUNICATE POTENTIAL SAFETY ISSUES OR CONCERNS INVOLVING EPIC OR NEW WORKFLOWS IMMEDIATELY THROUGH THE COMMAND CENTER SERVICE DESK AT 857-307-4600.

During launch, all Service Desk tickets flagged as patient care-critical will be reviewed daily by your site safety lead. As always, any incident of actual patient harm or a near-miss event should be reported via RL Solutions.

Here are five ways you can help ensure patient safety during and after our go live:

1. UNDERSTAND CLINICAL DECISION SUPPORT
   Understand how decision support will change when we transition to Epic.

2. MANAGE YOUR IN BASKET
   Providers, visit your InBasket daily to keep current on charts, lab results, and orders.
3. SAFELY MANAGE MULTIPLE CHARTS

Close charts and verify that you are documenting in the right patient chart to avoid misplaced orders and information.

4. UNDERSTAND PHASES OF CARE

When writing procedural orders, indicate the proper phase of care: pre-procedure, procedure, PACU/recovery area, etc. so nursing can release the appropriate orders.

5. RECONCILE MEDICATIONS

Review medications carefully with patients during initial post-live encounters to ensure each medication list is accurate.

REMEMBER, IF YOU SEE SOMETHING — EVEN IF YOU ARE JUST CONCERNED AND NOT CERTAIN — SAY SOMETHING.

For more information and tip sheets on any of the above topics, visit partnerscare.partners.org/addURLhere
Last Week in Patient Safety!

- Newsletter
  - Debut 4/6/15
  - Weekly document sent by email to Department Leaders group, Chiefs, Senior Leadership
- Leaders send to staff
- Highlights “Good Catch” events and storytelling
- Provides area specific data on reporting
- Content allows for printing and posting for all staff
- Provides talking points
PATIENT SAFETY REPORTING:
STRUCTURAL CHOICES AND CHANGES

Q: What do we need to do with our Patient Safety reporting system (rL Solutions) to support patient safety during EHR Implementation?

- How do we make it easy for staff to report?
- How will we report events related to implementation of EHR? What General Event Types should be used? Do they need to be consistent across a system?
- How can we pull data out of the system to track and trend patient safety issues and themes during implementation?
PATIENT SAFETY REVIEW PROCESS

Patient Safety team read all events reported in near real time – reviewed for data integrity, evaluated for connection to new EHR and recoded as needed.

Service Desk ticket numbers imbedded or report submitted with de-identified info.

Triage to additional Leaders, EHR leads, Senior Leaders, Risk Management for review.

Report created to help track themes, recurring issues, target areas for intervention. Reports created actionable data for Leadership to drive changes as needed.

Trended graphs over time help identify gaps or assure stabilization of the system.

Improved safety For Patients!
Safety Reporting (rL Solutions) can be accessed from within the Epic environment. Click on Epic:
- Open PHS Applications
- Open BWHC Applications
- Open Safety Reporting BWHC

**Choice:** Link within the new EHR allows for easy access to Safety Reporting System

**Note:** issues for single sign on and build configurations exist
Choice: Differentiate incidents that are primarily related to EHR from other events where EHR build or workflow plays a role (medication safety, handoff communication)
ECARE RELATED QUESTION WITHIN RL SOLUTIONS

**Choice:** Creating a field in the Resolution section that is visible to Leaders who review/close. Drop down allows Patient Safety team ability to tag reports as related to Electronic Health Record and/or new workflow. Field then pulls to report for trending.
A daily report was created to assist Leadership in overview of all safety events that were related to EHR or new workflows.
Pre-Epic Implementation alerts were sent out to all Managers, Directors and Patient Safety Staff every 4 hours, if a file was submitted.

Prior to Go Live the alert schedule for Patient Safety Staff was changed to every 30 minutes.

This allowed Patient Safety Staff to be aware of new safety events that were taking place more rapidly.

- Pro/Con for instant alerts
- Self selection for Leaders
WHAT HAPPENED?

Increased Reporting

- 25% increase in safety reporting starting at Go-live and sustained safety reporting engagement from front line staff
- 75% of reports are “near miss”

Increased Collaboration

- Hospital leaders use safety reporting to work on identified issues using actual data from incidents rather than anecdote
- Real time review of 100% of reports

Improved Process

- Patient Safety Site Lead integration into Leadership Report outs allows for tracking and responding bi-directionally
- Rapid identification and correction of Patient Safety gaps
OVERALL SAFETY EVENT VOLUME 2015

Go Live: Saturday May 30th 2015

Count

Month

Near Miss Events  Severity 2 of Higher Events

Jan: 114 47
Feb: 125 38
Mar: 127 60
Apr: 134 48
May: 130 41
Jun: 142 51
Jul: 182 47
Aug: 120 33
Sep: 130 47
Oct: 164 54
Nov: 176 42
Dec: 157 72
OVERALL SAFETY EVENT VOLUME & EPIC RELATED VOLUME 2015

Go Live: Saturday May 30th 2015
COUNT OF RL SAFETY EVENTS PER DAY: 2 WEEK POST GO LIVE

<table>
<thead>
<tr>
<th>Date</th>
<th>Count</th>
<th>Date</th>
<th>Count</th>
<th>Date</th>
<th>Count</th>
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Go Live!
COUNT OF RL SAFETY EVENTS BY WEEK

Go Live: Saturday May 30th 2015

<table>
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<tr>
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<th>Count</th>
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<td>June 21 - June 27</td>
<td>43</td>
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<td>June 28 - July 4</td>
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OVERVIEW: PATIENT SAFETY WITH NEW EHR

All Safety Event Reports
Go Live May 30 - September:

• 579 safety events were entered into BWFH’s electronic safety reporting system, RL Solutions.

• 78% of the safety events were near miss events.

• 130 safety events were assigned a severity rating of temporary or minor harm or higher

Epic/Workflow Related Safety Events
Go Live May 30 - September:

• 209 safety events entered into RL Solutions were a result of the EHR implementation.

• 82% of all EHR related safety events were near miss events.

• 37 EHR related safety events were assigned a severity rating of temporary or minor harm or higher

36% of files were flagged as Epic/Workflow related
EXAMPLES: PATIENT SAFETY GO-LIVE ISSUES

- Medication Reconciliation conversion [Med/IV Fluid]
- Uncoded allergies (free text conversion) [Med/IV Fluid]
- Medication scanning issues [Med/IV Fluid]
- Pended orders (training issue) [Med/IV Fluid]
- Radiology Laterality orders [Imaging]
- Wristband design [Coordination of Care]
- Handoff communication [Coordination of Care]
- Patient Movement- “Phases of Care”
  • This type of event eventually moved to GET Healthcare IT
## EHR/Workflow Related Safety Reports by Location

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
<th>Blood Product/Transfusion</th>
<th>Coordination of Care</th>
<th>Diagnosis/Treatment</th>
<th>Facilities/Environment</th>
<th>Healthcare IT</th>
<th>ID/Documentation/Consent</th>
<th>Surgery/Procedure</th>
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</table>

**Chart Description:**
- The chart illustrates the distribution of EHR/workflow-related safety reports across different locations within a healthcare facility.
- Each bar represents a location, with the height indicating the number of reports.
- Different colors denote various types of safety events, as indicated in the legend.

**Legend:**
- Blood Product/Transfusion
- Coordination of Care
- Diagnosis/Treatment
- Facilities/Environment
- Healthcare IT
- ID/Documentation/Consent
- Surgery/Procedure

**Note:** The chart data and locations are illustrative and do not reflect actual counts or data from a specific healthcare facility.
GENERAL EVENT TYPES FOR EPIC RELATED EVENTS

<table>
<thead>
<tr>
<th>General Event Type</th>
<th>Count</th>
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<tbody>
<tr>
<td>Medication/IV Fluid</td>
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<tr>
<td>Coordination of Care</td>
<td>46</td>
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<tr>
<td>Lab/Specimen</td>
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<td>Healthcare IT</td>
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<tr>
<td>ID/Documentation/Consent</td>
<td>14</td>
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<tr>
<td>Surgery/Procedure</td>
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<tr>
<td>Imaging</td>
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<tr>
<td>Blood Product/Transfusion</td>
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<tr>
<td>Facilities/Environment</td>
<td>4</td>
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<tr>
<td>Diagnosis/Treatment</td>
<td>1</td>
</tr>
<tr>
<td>Line/Tube/Drain (LTD)</td>
<td>1</td>
</tr>
<tr>
<td>Skin/Tissue</td>
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</table>
MEDICATION/IV SAFETY VOLUME 2015

Month

Jan 16
Feb 16
Mar 28
Apr 26
May 12
Jun 20
Jul 16
Aug 9
Sep 11
Oct 9
Nov 3
Dec 2

Count

0 5 10 15 20 25 30 35

Epic Related Events
Non Epic Related Events

RL PALCOZA '16
WHERE IN THE PROCESS – MEDICATION IV/FLUID

- Administration
- Dispensing
- Ordering/Prescribing

Count

Month

Go Live!

RL PALCOZA '16
HANDOFF RELATED SAFETY REPORTS

<table>
<thead>
<tr>
<th>Month</th>
<th>Count</th>
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<td>Jan</td>
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<td>Nov</td>
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</tr>
<tr>
<td>Dec</td>
<td>7</td>
</tr>
</tbody>
</table>

**Note:** The chart shows the number of handoff-related safety reports by month.
OVERALL SAFETY EVENT VOLUME & EPIC RELATED VOLUME TO PRESENT

Month

Jan 15' 161
Feb 163
Mar 187
Apr 182
May 167
Jun 84
Jul 75
Aug 47
Sep 41
Oct 35
Nov 51
Dec 18
Jan 16' 27
Feb 20
Mar 24
Apr 15

Count

0 50 100 150 200 250 300

Epic Related Events
Non Epic Related Events
CURRENT STATE

► Feedback to reporter: started July 2015
► Department level Safety Culture debrief and education on reporting (non punitive response to error): September 2015
  – Presentations to Chiefs, Departments
  – Integration into Leadership Council
  – Support by Senior Leadership
► Continued trending of Epic/Workflow related events at Patient Safety Committee
FEEDBACK TO REPORTER

Would you like follow-up on this report?

- Yes
- No

Was follow-up given? (Patient Safety Use Only)
- No

Follow-up Details (Patient Safety Use Only)
- pending

July 13, 2015 Feedback question was implemented

Count

Month

Jan 15' Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan 16' Feb Mar Apr

RL PALCOZA '16
OPPORTUNITY SUMMARY

- Seize the moment of a big system change to harness the energy of staff regarding reporting
- Build reporting system to address issues that staff are reporting
- Implement systems that publicize, value and celebrate reporting including “good catch” events
- Establish trust and confidence that there is a closed loop process for safety event reporting
- Maintain increased reporting while building Just Culture constructs
APPENDIX

How to insert a new field into a form

**Step 1:** Once in RL Solutions enter the “Admin Center”

**Step 2:** Click “Fields” under the Forms and Fields heading
**Step 3:** Make sure you are in module you would like to add the new field into and click “Add”

**Tip:** You can use one of the Pick List already provided by RL Solutions or create your own in the Pick List Manager under the Forms and Fields heading.

**Step 4:** Add in the criteria of the new field you are adding and don’t forget to save!
Step 5: Exit the “Fields” Section and click “Forms” under the Forms and Fields heading

Step 6: Select the form you are adding the new field to

* There are two options for every form - Manage or Submit.
Select the one based off of where you are adding the new field in the form

Step 7: Scroll down to the heading you would like the new field to fall under. Click the upwards facing arrow and select “Edit Section Template”

* Example: Our Epic related question was added under the Resolution and Outcome heading
Step 8: Determine where you would like to add the new field in the section and click the upwards facing arrow above/below the field you would like it to be near. Then Select field.

Step 9: Search for your new field by clicking the downwards facing arrow.

Step 10: Click Save add and your work is completed!
Christi Barney, RN, MSN

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Tayla Hough

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