

Safety in Practice

My Practice Trigger Tool Procedure

Preamble

As with any other PMS there are more than one process that can be used to do a structure case review to search for the identified Safety in Practice Triggers, this is one way but please feel free to feedback on this with enhancements or simplifications.

Also describing this type of process is by nature wordy and appears long but the process is actually simple and quick!

This is one process to examine the notes for triggers the full description of the trigger tool process is on the web site [link to be added] including what to do before the trigger tool process and what to do if a trigger is discovered

Prior to selecting the sample of 25 patients whose notes you will search for triggers remember to include all patients that were active at the start of the trigger tool review period, e.g. if you decided on the cohort of patients you wanted to study and searched for this cohort on the 1 December then you would want

- 1] 6-8 week to ensure all inbox documents had been received this would mean an end of study period of September 30
- 2] Study period is 3 months long so start of study period is 1st July
- 3] So the search needs to include all patients active as of 1st July as patients who die or leave may have done so in relation to a harm event

Process

For each individual patient

- 1] Bring up the clinical notes
- 2] Check their status in the patient details just under their name, most will be regular but if deceased then a trigger has been identified. Review the date of death and search the clinical notes during the study period to see if any error of commission or omission has contributed to this death.
- 3] From the lower section of the screen select the "Results" tab
 - Maximise this view so that the results screen fills the majority of the central screen..
 - Choose the "Sideview" tab from the right hand edge of the screen.
 - Choose the results triggers of interest [HB and eGFR} and track these through the study period to see if any reach the trigger levels [Hb under 100 eGFR under 35]. A tip is on the left of the screen next to the wording for the result is a small square if you click on this for a result it will highlight that result across the timeline and make this easier to follow across the study period.. I suggest for more complex patients with lots of test results you use the arrow or cursor at the bottom of this result screen to move the field of view across until the last test within the study period is the first test visible at the left hand side of the field.
 - Ensure all Hb and eGFR results within the 3 month study period are observed.

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4] Select “Notes” View.

- If all notes and results are visible in this filed select the “summary” tab and this will remove the results from this view. The “summary and following “collapse” instructions are in the grey/blue line at the top of this central screen
- If the notes are fully expanded initially select the collapse tab
- Select the “attachments” tab from the right hand side of this central screen
- Scroll through this for any after hours notes or hospital/emergency discharges.

5] Stay within the notes view

- Select the “sideview” tab from the right hand side of this central screen
- Use the arrows or cursor to scroll this view across until the last consultation within the study period is at the left edge of this screen.
- Scan these notes from the end of study period until the start looking for the four triggers
 - 1] Reduction in medication
 - 2] New medication
 - 3] New allergy or adverse reaction
 - 4] New cancer diagnosis

6] Return to the notes view again using the right hand tab. If notes have expanded select “collapse” again, not essential but easier.

- Identify the last note within the study period
- R click and hold on this to highlight the note and then drag the cursor downward until the first consultation within the study period is also highlighter then release the right hand button.
- Examine the dates of these highlighted consultations to assess if there were 2 consultations within a 7 calendar day period. **Please note** some of these entries may be scripts or telephone consultations and your clinical judgement will be needed to assess this.

7] Quickly check the Medication Side bar. This is on the far left of the computer screen in a column just to the left of the central screen you have been looking at. Clicking on this will bring up regular meds, allergies and recent medication and is a simple quick check of part of 5] above.

This process should identify if each of the patients has any of the 10 identified triggers. Remember if a trigger is found examine those notes related to that trigger for harm, do this for each trigger found.