

CONSUMER REPORTING SYSTEM FOR PATIENT SAFETY: Administrative Script When Matching Consumer Submission with Incident Reporting System

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**Module 8:
Administrative Script When Matching Consumer Submission with Incident Reporting System**

8.1 CRSO Status

- Screened
 - Exclusion reason:
 - Age
 - Grievance
 - Service complaint
 - Other [FREE TEXT]
- Audited (Free Text Reviewed and Sanitized)
 - [FREE TEXT]
 - [FREE TEXT]
 - [FREE TEXT]
 - [FREE TEXT]
 - [FREE TEXT]
- Finalized

Community [DROP DOWN]
Not Applicable [AUTO SELECT]
Community 1
Community 2

8.1.1 Was patient’s report edited based on follow up with reporter?

- a. Yes
- b. No, we spoke to reporter and there were no changes
- c. No, we were **not able to contact** the reporter
- d. No, we did not have permission to contact the reporter

8.1.2 Patient gave permission to speak to the facility

- a. Yes
- b. No (If no, do not proceed)

8.2 Was the Health Care Facility (HCF) aware of the patient safety concern?

- a. Yes
- b. No
- c. Unknown

8.3 Was it reported as a patient safety event?

- a. Yes
- b. No
- c. Unknown

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8.4 Who reported the event or unsafe condition?

- a. Healthcare professional (If selected, go to 7.4.1)

8.4.1. What is the type of healthcare professional?

- a. Doctor, dentist (including student)
 - b. Nurse, nurse practitioner, physician assistant (including student or trainee)
 - c. Pharmacist, pharmacy technician (including student)
 - d. Allied health personnel, paramedic
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- b. Healthcare worker, including liaison officer, patient transport/retrieval personnel, assistant/orderly, clerical/administrative personnel, domestic/hotel service personnel, interpreter/translator, technical/laboratory personnel, pastoral care personnel, or biomedical engineer
 - c. Emergency service personnel, including police officer, fire fighter, or other emergency service officer
 - d. Patient/relative/volunteer/caregiver/home assistant
 - e. Anonymous or unknown

8.5 Was a Root Cause Analysis (RCA) completed?

- a. Yes
- b. No
- c. Unknown

8.6 Are any contributing factors to the event known?

- a. Yes (If yes, go to 8.6.1)
- b. No
- c. Unknown

8.6.1 What factor(s) contributed to the event? CHECK ALL THAT APPLY:

- Team coordination factors
 - a. Communication: supervisor to staff
 - b. Communication: staff to patient
 - c. Communication: among staff or team members
 - d. Clinical Supervision
 - e. Managerial Supervision
 - f. Scheduling conflicts
 - g. Heavy workload
 - h. Shift change

- Staff/individual factors
 - a. Adherence to policy, protocols, or orders
 - b. Cognitive factors
 - c. Competence (qualifications, experience)
 - d. Familiarity with environment
 - e. Familiarity with policy and procedure
 - f. Fatigue
 - g. Health issues
 - h. Inattention
 - i. Long work hours
 - j. Stress

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- k. Training
- Operating environment factors
 - a. Biohazards and sharps management
 - b. Equipment/device availability
 - c. Equipment/device design
 - d. Equipment/device function
 - e. Equipment/device maintenance
 - f. Housekeeping
 - g. Physical surroundings (e.g., lighting, noise)
 - h. Unlocked/unsecured area
 - i. Interruptions (human)
- Workflow/Task Factors
 - a. Bed capacity
 - b. Delay in response to code
 - c. Delay in discharges
 - d. Staffing ratios
 - e. Transport delays
 - f. Consent error/not completed
 - g. Completion of patient/resident assessment
 - h. Data legibility
 - i. Data Availability
 - j. Data Accuracy
 - k. Management of test results
 - l. Order/requisition difficulties
- Patient/Resident Factors
 - a. Agitated/aggressive
 - b. Confused/disoriented
 - c. Impaired hearing or speech
 - d. Language barrier
 - e. Refusal of care or non-compliance
 - f. Unresponsive
- Management/organization Factors
 - a. Clarity of policy/procedure
 - b. Culture of safety management
 - c. Empowerment (eg any healthcare provider can call a code)
 - d. Presence of policy/procedure
 - e. Resource constraints (financial or human)
- Other
 - a. Please Specify [FREE TEXT]

8.7 Lessons Learned?

[FREE TEXT]