Patient Safety Case Conference Worksheet

Use this card to organize and document the Case Conference or M&M process.

What Happened?* (Brief notes or flow chart)

Why Did it Happen? (Circle relevant questions)

Information Systems
- -Patient correctly identified?
- -Documentation provides a clear picture?
- -Training Issues? Communication issues?
- -Level of automation appropriate?
- -Other? ____________________

Equipment
- -Displays & controls understandable?
- -Equipment detects & displays problems?
- -Standardized or several different models?
- -Maintenance/upgrades up to date?
- -Warnings/labels understandable?
- -Other? ____________________

Environment
- -Noise levels interferes with voices/alarms?
- -Lighting adequate for tasks?
- -Adequate air, water, surface temperature?
- -Other? ____________________

Architecture
- -Area adequate for people & equipment?
- -Clutter or inadequate stowage?
- -People flow adequate, optimal?
- -Work areas, tools, etc. located correctly?
- -Other? ____________________

Policies and Processes
- -Audit/quality control for process?
- -Do people work around official policy?
- -Standardized process, or order set?
- -Use of checklists or other tools?
- -Other? ____________________

Safety Mechanisms
- -Did anything stop or decrease harm?
- -Equipment safety mechanisms functional?
- -System designed to be fault tolerant?
- -Other? ____________________

***Note** **This is a Quality Improvement document. Do not include patient or healthcare provider identifiers!**

Why Did it Happen? (Root cause/contributing factor statements)

How to prevent it?

Standardize/Simplify
* Standardize equipment
* Standardize protocol
* Remove unneeded step(s)

Automation/Computerization
* Automatic calculations
* Provide reminders
* Assist decision making

Improve or New Devices
* Better controls/displays
* Better integration
* More fault tolerant

Improve Architecture
* Improve flow of personnel
* Better lighting, noise, clutter
* Better stowage, signage, etc.

Your Specific Solutions:

Evaluating Effectiveness

What outcome will be measured?

Date of measurement?____________________________