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# High Reliability: Using Daily Operations And Safety Briefings



## Who Are We?

**Jessina Wachtelhausen RN**

Chief Nursing Officer  
Ryan Health Network

**Ronald Jean MHA, PMP, ATC OTC**

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Ryan Health Network

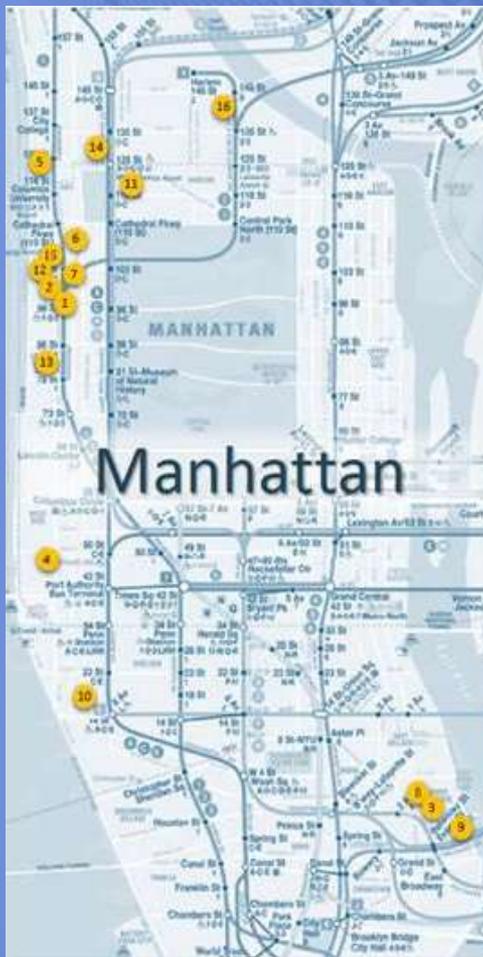


# Ryan Health

Caring for New York. Here for You.

## Manhattan Service Area

- 18 services sites:
  - 6 main sites
  - 7 SBHCs
  - 4 CHOs
  - 1 mobile medical van



### 18 SERVICE SITES

#### Main Sites:

1. William F. Ryan Community Health Center  
110 West 97<sup>th</sup> Street, 10025
2. Ryan Women and Children's Center  
801 Amsterdam Avenue, 10025
3. Ryan-NENA Community Health Center  
279 East 3<sup>rd</sup> Street, 10009
4. Ryan/Chelsea-Clinton Community Health Center  
645 Tenth Avenue, 10036
5. Ryan/Thelma C. Adair Community Health Center  
565 Manhattan Avenue, 10027

#### School Based Health Centers

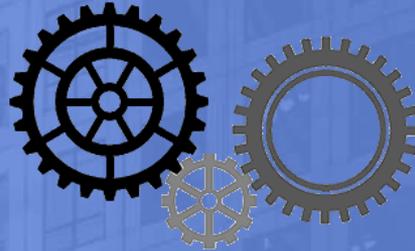
6. Middle School 54, Booker T. Washington  
103 West 107<sup>th</sup> Street, 10025
7. Edward A. Reynolds West Side High School  
140 West 102<sup>nd</sup> Street, 10025
8. Public School 64  
600 East 6<sup>th</sup> Street, 10009
9. Public School 188/Island School  
442 East Houston Street, 10002
10. Public School 11/Middle School 260  
320 West 21<sup>st</sup> Street, 10011
11. Public School 180/Hugo Newman College Prep  
370 West 120<sup>th</sup> Street, 10027

#### Community Outreach Centers

12. Regent Family Residence  
2720 Broadway, 10025
13. West End Intergenerational  
483 West End Avenue, 10024
14. Convent Avenue Living  
22 Convent Avenue, 10027
15. The Bridge  
248 West 108<sup>th</sup> Street, 10025
16. Mobile Medical Van



# Becoming An Organization Of High Reliability



“

Ability is a wonderful thing, but its value is greatly enhanced by dependability. Ability implies repeatability and accountability.

Robert A. Heinlein



# 5 Characteristics Of Organizational High Reliability:

## High Reliability

- I. Preoccupation w/failure  
\*Focus on errors/near misses for learning, attention to detail, finding & fixing problems
- II. Reluctance to simplify operations  
\* Constant "Why?", invite opinions from others w/diverse experience
- III. Sensitive to operations  
\*Ongoing concern w/the unexpected - situational awareness, developing teams w/power to speak up, closing loopholes for patient harm, paying attention to front line
- IV. Commitment to resilience  
\*Mistakes happen - but identify them quickly & respond/minimize harm
- V. Deference to expertise  
\*Front line as experts - empower them w/decision-making



## How does the Daily Safety Huddle work?

- A brief meeting (e.g., “huddle”) of network representatives & key team members at the beginning of the day or shift
- Usually conducted daily M-F at same time each day
- Builds teamwork through communication & cooperative problem solving
- Ensures common understanding of focus & priorities for the day
- The reporting structure is a Look Back-Look Ahead and Follow-Up approach.

Safety Huddles Are Tools For Highly Reliability Organizations



## Increase & maintain situational awareness

- Improves overall leadership awareness of the status of front-line operations
- Provides timely recognition and resolution of problems that impact outcomes
- Provides for alignment & focus of the leadership team around safety and key operational issues





## An effective daily safety huddle

Communicates the urgency of resolving safety issues and critical situations

Allows the team to plan for the unexpected

Allows team members' needs and expectations to be met

Uses concise & relevant information to promote effective communication across departments



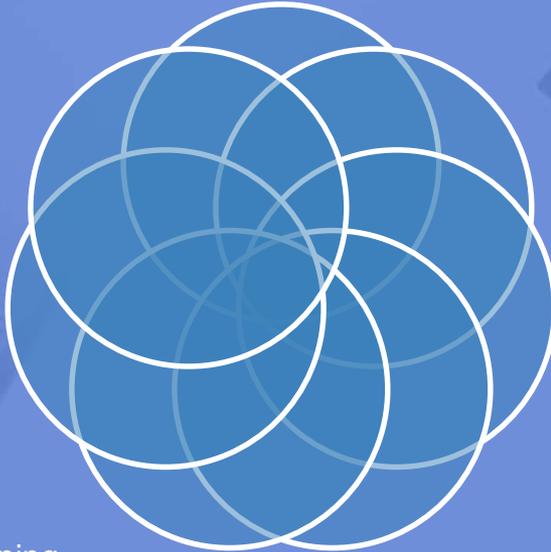
## Future Perspectives

Senior Leadership  
awareness of what's  
happening at the front line

Safety becomes a  
priority – culture  
change achieved

Increased awareness  
of other departments'  
activities & Issue

Increased  
departmental  
leadership situational  
awareness of their  
department/staff  
issues



Quick issue  
resolution – often  
same day

Significant learning  
opportunities for  
participants – “walk in  
my shoes”, “understand  
my issues”

Reduced “silo  
operations” – more  
teamwork

# DSOB IMPLEMENTATION

*Customizing Your Organizational Approach*





## Easy Process





## Agenda



- LOOK BACK:

- \*Significant safety or quality issues from last 24 hours/last shift

- LOOK AHEAD:

- \*Anticipated safety or quality issues in next 24 hours/next shift

- FOLLOW UP:

- \*On Start-the-Clock Safety Critical Issues



## Huddle Representatives Roles

Deficiencies noted that impact safe care?

- Report problem on huddle call
- Assign a “problem owner”
- Follow up action is led by network leadership



## Examples of When Huddles Can Be Effective

- “Never Events”
- Sentinel Events
- Any injury to patients or family
- Medication issues
- Wrong procedure done or ordered
- Unable to resolve escalating patient/family concerns
- Trends in safety
- Site Access



## Issues for Reporting

### Nursing

Events of impact in the next 24hrs & plans in place

Consider “Situational Awareness List” for reporting -example:

- Equipment issues adversely impacting patient care
- Medication shortages impacting unit
- Unmet critical staffing needs

Medication Storage	Comments
1	Low Bicillin, on delayed order
1	Out Bicillin 2.4. awaiting delivery
1	National back order for lidocaine xylocaine



## Issues for Reporting

### Facilities

Events of impact in the next 24 hours & plans in place:

- Environmental (situations or conditions)
- Risk Reports/Serious Safety Events (issues & harm)
- Security Updates

Leaks		Power	
#	Comment	#	Comment
1	large leak over registration desk, resolved	0	
0		0	
0		1	Power down west wing
0		0	
1	Small leak, No Damage	0	



## Patient Safety Events

- Unanticipated
- Sentinel Events
- Medication Errors
- Adverse Drug Reactions

## Unexpected Injuries

- Burns
- Malfunctioning Equipment

Theft		Assault		Threat		Negligence	
#	Comment	#	Comment	#	Comment	#	Comment
1	Pt Purse reported missing	0		0			
0		0		1	Pt to Provider verbal threat reported. Under Investigation		
0		0		0			



## Information Technology

- Comp or Comm outages -planned/unplanned
- Anticipated IT downtimes & impact on ops
- Change in IT process or policy
- IT impact on any facility or environmental issue
- New software implementations
- Significant hardware deployments
- Resource and staffing concerns

Facilities/IT		Repairs		Equipment Facility	
#	Comment	#	Comment	#	Comment
0		0		0	
1	Shortel not working, spectrum began repair, on going	0		2	2 Vital machines waiting on repairs.
1	Fax/phone line issue not yet resolved- alarm system	0		0	
0		1	Printer Repair in Medication Room at 2pm	0	
1	Wifi down in lobby	0		0	
0		0		1	EKG Machine Not Functioning



## Consider These:

- Reporting “days since last serious safety event”
  - \*Puts the spotlight on safety & high reliability
  - \*Makes the daily goal of creating a safe day explicit
  - \*Gets everyone engaged in maintaining safety
- Share a “safety success story”
  - \*Good catch, something that made a safety difference





## Documentation Tool

### DOSB Cheat Sheet

Date:

Site:

Checked By:

Staffing



Check	Item	Theft	Assault	Threat	# 911 Calls	Remarks
<input type="checkbox"/>	Security Events in last 24hrs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Patient Safety & Employee Events last 24hrs	<b>Fall</b> <input type="checkbox"/>	<b>Needle</b> <input type="checkbox"/>	<b>Medication</b> <input type="checkbox"/>	<b>Hipps Bre</b> <input type="checkbox"/>	Remarks
<input type="checkbox"/>	Staff (Red, Green, Yellow)*	<b>Nurse</b> <input type="checkbox"/> Red <input type="checkbox"/> Green <input type="checkbox"/> Yellow	<b>Providers</b> <input type="checkbox"/> Red <input type="checkbox"/> Green <input type="checkbox"/> Yellow	<b>Operational</b> <input type="checkbox"/> Red <input type="checkbox"/> Green <input type="checkbox"/> Yellow		Remarks
<input type="checkbox"/>	Current Facilities/IT Events:	<b>IT outage</b> <input type="checkbox"/>	<b>Leaks</b> <input type="checkbox"/>	<b>Power</b> <input type="checkbox"/>		Repairs <input type="checkbox"/>
<input type="checkbox"/>	Current Equipment Needs/Medication Shortage	<b>Faulty</b> <input type="checkbox"/>	<b>Med Shortage</b> <input type="checkbox"/>	<b>Replacement</b> <input type="checkbox"/>		Remarks
<input type="checkbox"/>	Sick Visit Availability	<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>			Remarks

Representative Name and Signature: \_\_\_\_\_

### Staffing

**Red** : Significantly impacted Ex: Pt's cancelled, providers rooming pts, giving their own shots

**Green** : Little or no impact on operations

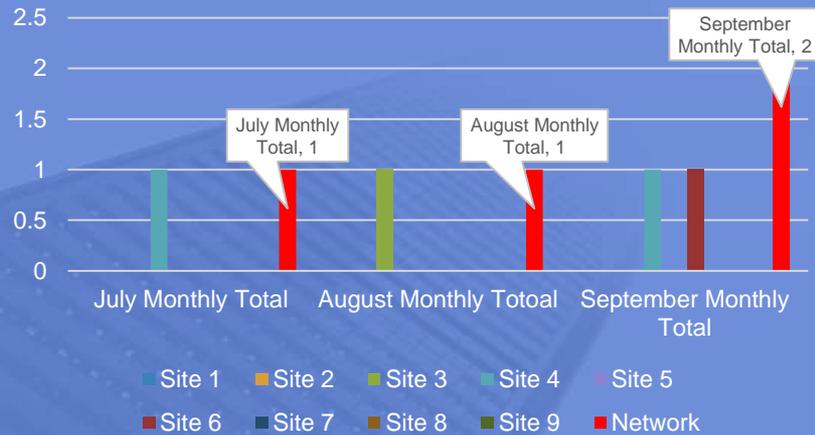
**Yellow** : Moderate impact on Opts Ex: Sup covering line staff for the day on floor or front desk



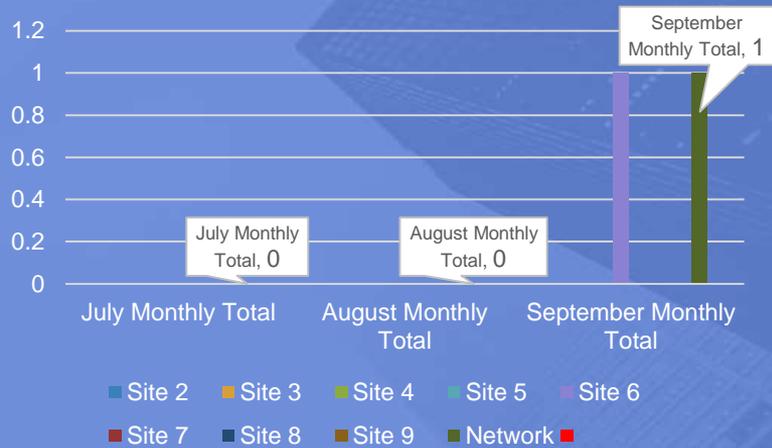


# Dash Board: Safety Events

## Fall Events



## Needle Events

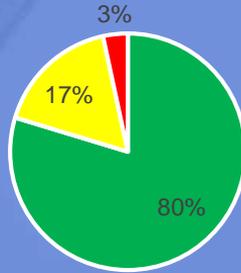


Analyze: Tracking safety.....

# Dash Board: Nurse Staffing

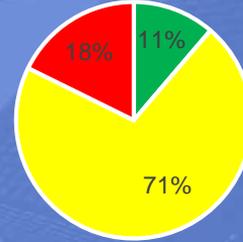
Analyze: Tracking staffing by categories.....

### Site 1 Nursing



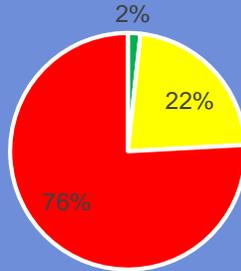
Green Yellow Red

### Site 2 Nursing



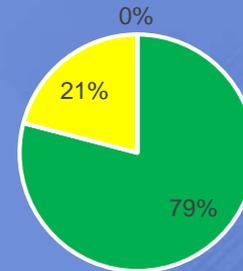
Green Yellow Red

### Site 3 Nursing



Green Yellow Red

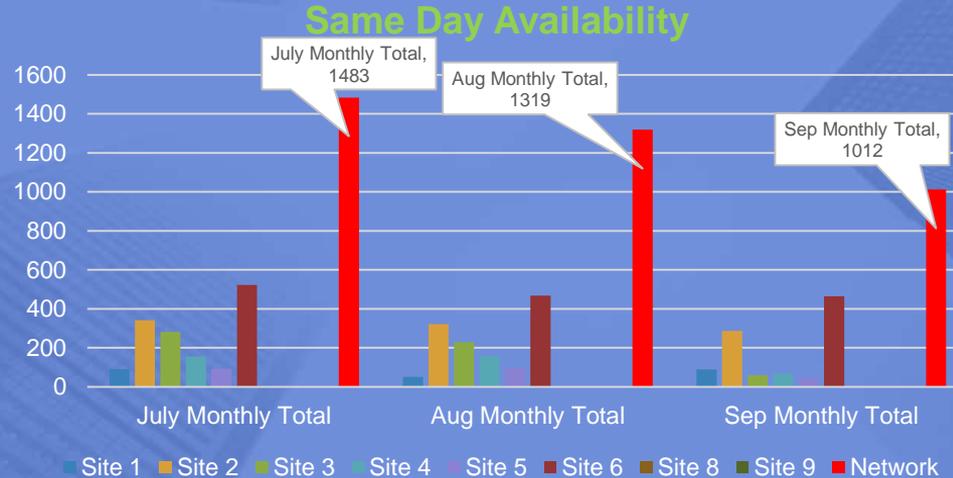
### Site 4 Nursing



Green Yellow Red

# Dash Board: Same Day Availability

Analyze: Tracking patient access.....



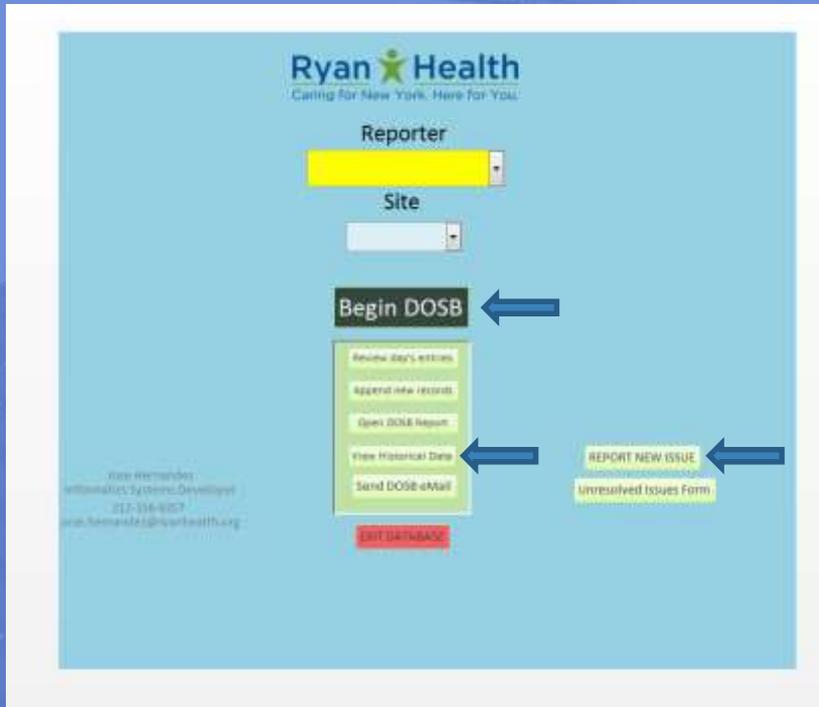
Daily Average

- Site 1: 3.8
- Site 2: 15.3
- Site 3: 9.3
- Site 4: 6.1
- Site 5: 3.7
- Site 6: 23.4

Analysis: SD visits availability decreased by -33%

# New Reporting and Data Warehouse Platform

## Microsoft Access



- Internally Created System To House & Access All Historical Data
- Automated Reporting, Decreasing Manual Management & Porting Errors
- Drive Down Reporting Ability
- Synced With Power BI For Creative Dash Boards
- Open Access For Senior Leaders

# Microsoft Access

The screenshot shows a web application interface for reporting incidents. At the top, it displays the 'Incident Report Date' as 6/19/2018 and the organization as 'Ryan Health DOSB' with the tagline 'Caring for New York. Here for You.' and 'Site: 97th'. A 'Today's Records' section is highlighted in yellow. Below this, there are several sections for reporting events:

- Security Events in Last 24**: Includes fields for 'Thefts', 'Theft Comments', 'Assaults', 'Assaults Comments', 'Threats', and 'Threats Comments'.
- Patient Safety and Employee Events last 24hrs**: Includes fields for 'Needles', 'Needle Comments', 'Meds', 'Medication Comments', 'Falls', 'Falls Comments', 'WFRs Breach', and 'WFRs Breach Comments'.
- Staff Code (Red, Green, Yellow)\***: Includes fields for 'Nurse Absences', 'Nurse Absences Comments', 'Nurse Vacancies', 'Nurse Vacancies Comments', 'Provider Absences', 'Provider Absences Comments', 'Provider Vacancies', 'Provider Vacancies Comments', 'Ops Absences', 'Ops Absences Comments', 'Ops Vacancies', and 'Ops Vacancies Comments'.
- Facilities/IT**: Includes fields for 'Leak', 'Leak Comments', 'Power', 'Power Comments', 'IT Outages/IT Comments', 'IT Outages/IT Comments Comments', 'Request', and 'Request Comments'.
- Current Equipment Needs/Medication Shortage**: Includes fields for 'Equip.', 'Equip. Comments', 'Medis Storage', 'Medication Storage Comments', 'Replace', and 'Replace Comments'.

Each field has a dropdown menu with 'Error' as an option. The interface is designed for structured data entry.

- Daily Report In Structured Data Fields
- Days To Resolution Track Ability



# Daily Report

<p>Open Alerts: 10/25/2018 10:17 AM            Alerts: 10/25/2018 10:17 AM            Moderate Impact: 10/25/2018 10:17 AM            Low or no impact on operations</p>															<p><b>Ryan Health</b>            Caring for New York. Here for You.  <b>Daily Operational and Safety log</b></p>										<p>Reviewed by:            Ronald Jean            Wednesday, 10/25/2018</p>			<p>Site Information:            10/25/2018 10:17 AM            311-338-4007            2018-10-25 10:17 AM</p>		
Site	Threat	Threat Comments	Severity	Alerts Comments	Threat	Threat Comments	Health	Rescue Comments	Medication	Medication Comments	Fall	Fall Comments	HIPAA	HIPAA Comments	Monitor	Monitor Comments	Nurse Codes	Pharmacy	Pharmacy Vis	Phon. Codes	Operational	Operational	Op. Codes	Labels	Labels Comments	Power	Power Comments			
Site 1																	GREEN				GREEN									
Site 2																	GREEN				GREEN			GREEN						
Site 3																	YELLOW				YELLOW			GREEN						
Site 4																								YELLOW						
Site 5																	GREEN		3	RED				YELLOW						
Site 6																	GREEN		1	YELLOW				GREEN						
Site 7																	YELLOW				GREEN			GREEN						
Site 8															1		GREEN				GREEN			GREEN						
Site 9																	GREEN				YELLOW			YELLOW						

Site	IT Comments	Repair Comments	Facility Comments	Medication Storage Comments	Replaces Comments	In Available	SDA Alert Comments	911 in text 24 Comments	Follow-up Comments
Site 1							Open P104, P111, P130, W144		
Site 2						1	1 Family		
Site 3					1	48 in Cam Replacement	27	13 adult 8 beds	
Site 4									
Site 5			1	1	1	1	2 parts 1 med 1 part 2 gen		
Site 6							Single Open w/ Provider & LPN Repair & W. Haines Open w/ LPN		
Site 7							0 adult		
Site 8							13 adult same days		
Site 9					1	1	13 ped w/ 0		



## Lessons Learned

### **Back Up Reporter**

Identify multiple reporting resources for sites to cover participation in lieu of call outs and/or scheduling conflicts.

### **Clarifications**

Clearly define each reporting criteria. What constitutes a Threat, Assault, or Facility event?

### **Satellite's Needs**

Satellite and smaller operations equate to large needs.

### **Resource Planning**

Identify resource needs based on patient volume to categorize staffing and plan operational responses.

### **Reporting**

Customize dashboards and reporting frequency to meet the needs of organization.

### **Leveraging Data**

Converting data into actionable items. Engage management in meaningful data analysis



**Ryan Health**

Caring for New York. Here for You.

# Thanks Any Questions?

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