



JPSR USER GUIDE FOR THE REPORTING AND INVESTIGATING OF PATIENT SAFETY EVENTS

Record of Changes

This section will list the original document submission date and any revisions thereafter.

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Contents

Record of Changes	1
Contents	2
Figure Index	3
Event Details	8
When	8
Where	9
What	9
Patient	10
Required Information	11
Triggered Sections	12
Patient Involved Details	12
Medication	13
Equipment/Materiel Details	14
Attached Document Details	14
Details of Person Reporting Event	15
Submitting the Record	16
Rejecting Events	19
Name and Reference	19
Location	20
Details	20
Event Classification	21
Investigation	22
Action Plan	23
Feedback and General E-mail Correspondence	26
Contributing Factors	26
Associated Events	27
Notepad	28
People Affected	28
Process to Verify a Contact	29
Resource Information	30

Figure Index

FIGURE 1 - PROCESS FLOW	4
FIGURE 2 JPSR SCREENSHOT – DOD NOTICE AND CONSENT	5
FIGURE 5 JPSR SCREENSHOT – EVENT DETAILS, WHEN	8
FIGURE 6 JPSR SCREENSHOT - EVENT DETAILS, WHERE	9
FIGURE 7 JPSR SCREENSHOT – EVENT DETAILS, WHAT	9
FIGURE 8 JPSR SCREENSHOT – RELATED TO THE USE OF AN ELECTRONIC HEALTH RECORD	10
FIGURE 9 JPSR SCREENSHOT – REQUIRED INFORMATION	11
FIGURE 10 JPSR SCREENSHOT -DETAILS	12
FIGURE 11 JPSR SCREENSHOT – DRUG SECTION DETAILS	13
FIGURE 12 JPSR SCREENSHOT - MEDICATION SEARCH POPUP	13
FIGURE 13 JPSR SCREENSHOT – EQUIPMENT/MATERIAL DETAIL	14
FIGURE 14 JPSR SCREENSHOT - DOCUMENTS	15
FIGURE 15 JPSR SCREENSHOT – REPORTER’S INFORMATION	15
FIGURE 16 JPSR WORKFLOW FOLLOWING EVENT SUBMISSION	17
FIGURE 17 JPSR SCREENSHOT – LOGGED-IN HOMEPAGE	17
FIGURE 18 JPSR SCREENSHOT - NAVIGATION PANE	18
FIGURE 19 JPSR SCREENSHOT – DESKTOP HEADER EVENTS WITHIN A PARTICULAR STATUS	18
FIGURE 20 JPSR SCREENSHOT – NAME AND REFERENCE	19
FIGURE 21 JPSR SCREENSHOT – DEGREE AND DURATION OF HARM	20
FIGURE 22 JPSR SCREENSHOT – RCA, SE AND AAAHC DOCUMENTATION FIELDS	20
FIGURE 23 JPSR SCREENSHOT – EVENT CLASSIFICATION	21
FIGURE 24 JPSR SCREENSHOT – INVESTIGATION SECTION	23
FIGURE 25 JPSR SCREENSHOT – ACTION PLAN, NO ACTIONS YET	24
FIGURE 26 JPSR SCREENSHOT – ACTION PLAN, CREATING A NEW ACTION	24
FIGURE 27 JPSR SCREENSHOT – FEEDBACK AND CORRESPONDENCE	26
FIGURE 28 JPSR SCREENSHOT –CONTRIBUTING FACTORS GROUP AND INDIVIDUAL CONTRIBUTING FACTORS	26
FIGURE 29 JPSR SCREENSHOT – LINKING EVENTS	27
FIGURE 30 JPSR SCREENSHOT – LINKING EVENT DETAILS	27
FIGURE 31 JPSR SCREENSHOT – PSM AND REVIEWER NOTEPADS	28
FIGURE 32 JPSR SCREENSHOT – APPROVING AN UNAPPROVED CONTACT	28
FIGURE 33 JPSR SCREENSHOT – CHECKING FOR MATCHING CONTACTS	29
FIGURE 34 JPSR SCREENSHOT – CHECKING FOR MATCHING CONTACTS	30

CHAPTER 1: OVERVIEW

The Department of Defense (DoD) Joint Patient Safety Reporting System (JPSR) is a Common Access Card (CAC) enabled, Commercial-off-the-Shelf (COTS), web-based application for the self-reporting of:

Actual Events

Patient Safety Events that reach the patient and may or may not cause harm.

Near Misses

Events that are caught before reaching the patient (i.e., DO NOT reach patient).

Potential Events

Unsafe conditions that increase the likelihood of a Patient Safety Event

Although JPSR access requires a CAC, reporting does not require application user log-in so all DoD staff are able to report events. JPSR is configured to collect two types of data:

Structured Data

Allows for the aggregation of actual event, near miss and potential event data, as well as trending and analysis at all levels within the enterprise. Structured Data encompasses important descriptors and known risk factors to permit the efficient analysis of events and identification of patterns.

Narrative Data

Provides greater detail about an individual event and more complete descriptions of event occurrences and investigations.¹

JPSR is aligned with the Agency for Healthcare Research and Quality (AHRQ) Common Formats and uses a standardized taxonomy to promote consistent data collection and aggregation for trending and analysis.

Steps 1 – 5 in Figure 1 occur at the local facility level and contain patient identifiable information. This information is only viewable at the local level. After the record is finalized (Step 6), a de-identified, non-editable version of the event report

becomes viewable at the Service Region, Service Headquarters (HQ) and Defense Health Agency (DHA) Patient Safety Analysis Center (PSAC) levels.



Figure 1 - Process Flow

PSR reporting requires the completion of two forms. The Reporting Form (or DIF1) is for the initial reporting of an actual, near miss or potential Patient Safety Event and is designed to be completed by

¹ AHRQ Common Formats Users Guide Version 1.2, p. 1-2.

the person identifying the event. The Reporting Form (DIF1) collects basic information about the event and allows the Reporter the choice to remain anonymous (default) or to enter his/her information as s/he sees fit. Even though a CAC must be used to access the PSR system, details of the CAC user reporting the event are not retained by the application.

The Investigation Form (or DIF2) is for the subsequent review and investigation by the Patient Safety Manager (PSM) and other staff as assigned. It allows the PSM; to review the event, assign a degree and duration of harm associated with the event, determine the event type classification, assign the event for staff investigation and complete a final review of the event before it is made available to the Service HQ and DHA PSAC for review, aggregation, and reporting.

To access the Investigation Form (DIF2) the user must have defined JPSR access and privileges. The JPSR Program recommends the JPSR Icon be included on all desktops so that direct access is possible. After accepting the usual mandatory DoD Notice and Consent, the user is directed to Identity Authentication Services (iAS) page. The user must then authenticate by clicking on the bright green button labeled CAC/PIV etc.



Figure 2 JPSR Screenshot – DoD Notice and Consent

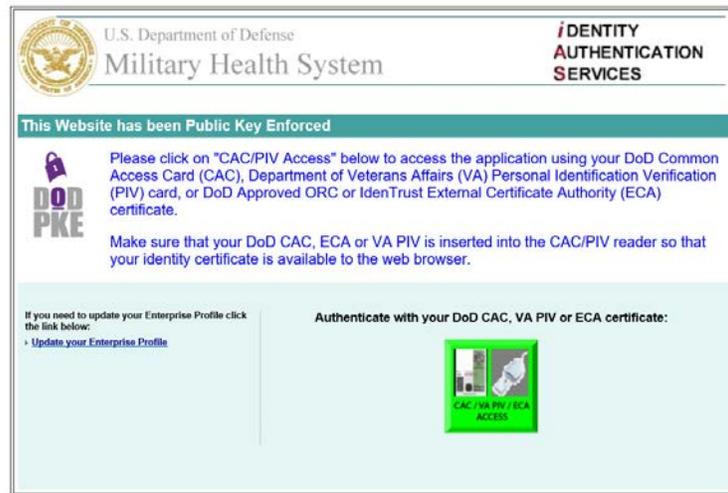


Figure 3: JPSR Screenshot – Identity Authentication Services

The user then selects the Department of Defense Seal to enter the DoD portion of the PSR application by clicking on the Seal. Both the DoD and the VHA use the JPSR Joint Patient Safety Reporting system so it is critical you log into the correct agency.



Figure 4 JPSR Screenshot – Landing Page for DoD and VA

The next two chapters describe in detail how to report an event by completing the Reporter Form (DIF1) and Investigations forms. Some important definitions and icons to keep in mind regarding the forms include:

Icon	Definition
* Red Asterisk	Mandatory field. All mandatory fields displayed must be completed before the DIF1 can be submitted or the DIF2 can be saved.
* Black Asterisk	DoD Sentinel Event Type
JPSR Help	Can be accessed by clicking on the 'JPSR Help' hyperlink at the top and bottom of each page. It provides in-depth information to guide the User in the completion of the forms in JPSR.
	<p>Allows the user to pull up a calendar to select a date. Clicking the < or > key changes the calendar by a month backward or forward.</p> <p>Clicking the << or >> key changes the calendar by one year backward or forward</p>
	JPSR uses Greenwich Mean Time to keep time consistent across all time zones.
	The down-arrow icon indicates there is a list of selections to choose from in order to populate the fields

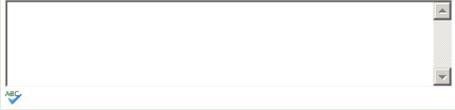
	<p>The multi-pick field allows for more than one option in a drop-down field to be selected</p>
	<p>This open text field can support the entry of over 2,000 characters and offers spell check functionality</p>
	<p>Overdue event. This function is set by a business rule that states the event is overdue by 14 days from the date the event was submitted.</p>
	<p>The spell-check function is accessible within some fields by selecting the ABC checkmark icon below the field. The icon will turn into a pencil and the user can then edit incorrectly spelled words by clicking on them and selecting the proper spelling from a list of choices that appears on the screen. Once edits have been completed, the User should select the pencil icon, which will revert back to the original ABC checkmark icon, and resume with the next field. The spellchecker DOES NOT include a medical spell checking capability.</p>
	<p>Select this icon for help with completing an individual field.</p>
<p>Clear Section</p>	<p>Allows the User to clear any data s/he has entered into a section of the report. Note: This command clears all the information in that section.</p>

Table 1 – Icons and field types of JPSR

CHAPTER 2: EVENT REPORTING

The Reporting (DIF1) Form is the initial form which provides basic information about the event. It consists of several fields some of which are mandatory. These fields define when and where the event occurred, as well as what the details of the event include. Fields are provided for the Reporter to identify him/herself if s/he so desires. The Reporting form (DIF1) also contains fields that are only displayed based on responses to other previous fields.

For example, if the Reporting chooses Yes in response to the following question, “Was this a medication event,” several additional fields will appear to determine medication(s) involved in the event as well as the stage of the process in which the event occurred. The following fields similarly add additional pertinent questions when a response of Yes is selected:

- Is this event related to the use of an electronic health record?
- Was a patient involved?
- Was this a medication event?
- Was equipment/materiel involved?
- Are there any documents to be attached to this record?

It should be noted that because the Reporting form (DIF1) defaults as anonymous, there is no way to save the form without fully completing and submitting it. JPSR will timeout ten (10) minutes of inactivity per the DoD Information Security Policy, so it is important that the Reporting has sufficient time to complete the Reporting form (DIF1) in one sitting.

Event Details

When

The first three fields within the Event Details section describe the date and time when the event occurred (mandatory fields), as well as the date the event was discovered:

Event date

Entered in mm/dd/yyyy format,
or via the calendar icon

Event time

Entered in local 24 hour time
in hh:mm format

Discovery date

Entered in mm/dd/yyyy format, or via the calendar icon

The screenshot shows a form titled "Event details" with a subtitle "This section asks you to detail *When*, *Where* and *What* happened." There are three input fields: "Event date (MM/dd/yyyy)" with a calendar icon, "Event time (hh:mm) (24 hour local time)" with a time selection icon, and "Discovery Date (mm/dd/yyyy)" with a calendar icon. Each field has a red asterisk indicating it is mandatory.

Figure 5 JPSR Screenshot – Event Details, When

² DoD Information Security Program: Overview, Classification, and Declassification. 5200.01, Volume 1. 24 February 2012.

Where

The next seven (7) mandatory fields describe the demographics of the event occurrence. These fields, with the exception of Location Type, are structured Service- and facility-specific data fields. When the Reporting selects the MTF, the Parent MTF, Service Region, and Service Affiliation auto-populate.

The Department/Division/Directorate, and Clinic/Service fields do not auto-populate and must be completed by the Reporting. Location Type is a generic field most useful for aggregation at levels above the facility level. When completing MTF, Department/Division/Directorate and Location Type it is helpful and quicker if the Reporting types a fragment of the appropriate name as it will make the search much quicker.

Figure 6 JPSR Screenshot - Event Details, Where

What

This section of fields contains free text fields. Three (3) of these fields are mandatory.

DO NOT include any names or identifying information in any of the fields described below. If names or identifying information are included in these fields **it will be viewable** at the headquarters and PSAC levels.

Event Description

This mandatory field allows the Reporting to describe the event and is the most important field on the Reporting Form. It should be complete enough so that the PSM and any investigator(s) have a complete understanding of what happened. It should include

ONLY FACTS and not opinions.

Number of Times Occurred

This mandatory field provides the Reporting with a quick way to enter multiple near-miss events that occur frequently in areas like pharmacy, laboratory, and radiology without having to enter multiple, individual event reports. Once the PSM reviews the event and determines the number entered is accurate and reasonable, the PSM should copy the event the number of times denoted and edit the *Number of Times Occurred* field for each report back to 1. This provides a complete accounting of the total number of events, types of events, contributing factors and events occurring in a particular location as JPSR reporting only counts fields and totals from individual event reports, not the *Number of Times Occurred* fields.

Figure 7 JPSR Screenshot – Event Details, What

Immediate Action Taken

This mandatory field allows the Reporter to document actions taken to prevent or lessen patient harm.

What do you think caused the Event

This free text field allows the Reporter to provide his/her opinion on the cause of the event. This is not a mandatory field for the Reporter.

Reporter's Recommendations

This free text field allows the Reporter to provide his/her opinion on what could prevent this type of event in the future. This is not a mandatory field for the Reporter.

Because of the scope and impact of the MHS' implementation of its new electronic health record, two additional fields have been added to identify events potentially linked to the implementation of Genesis and other legacy systems such as AHLTA, CHCS, and others. If the reporter answers Yes to the question "Is the event related to the use of an electronic health record?" a secondary mandatory field to identify the system with which the event is potentially linked opens and displays a drop-down selection.



The screenshot shows a form with two mandatory questions, each marked with a red asterisk. The first question is "Is this event related to use of an electronic health record?" with a dropdown menu showing "Yes". Below it is a text box with the example: "For example, was the event related to order set errors, cut and paste, alert overrides, etc." The second question is "Please select the electronic health record involved in the event:" with an empty dropdown menu.

Figure 8 JPSR Screenshot – Related to the Use of an Electronic Health Record

Patient

Patient Status (Is the patient an inpatient or outpatient)

This is a mandatory question. The Reporter should select whether the patient's status is Inpatient, Outpatient or N/A (for example, the person is in the facility or on the grounds, but not present as a patient). This is not a mandatory field for the Reporter.

Was the provider notified

This is a Yes or No question depending on whether the provider was notified of the event. This field is not mandatory. If the Reporter selects Yes, the reporter must then include the following in the Provider Information free text field:

Provider Last Name

Provider First Name

E-mail and Telephone

Other pertinent notes

Was the patient in transit

This is a mandatory Yes or No question. A response of Yes should be selected if the patient event occurs during any kind of transport within or between facilities.

A drop-down list of types of transit can then be selected.

Required Information

Answering Yes or marking the checkbox will open additional sections on the form.

Was a patient involved

This is a mandatory field. Selecting Yes will trigger a drop-down series of questions pertinent to information regarding the patient involved.

Is this a medical or dental event

This mandatory field allows the Reporter to document whether the event was medical or dental.

Was this a medication event

This mandatory field allows the Reporter to document whether the event is a medication event. Selecting Yes will trigger a drop-down series of questions pertinent to medication events.

Was equipment/material involved

This is a mandatory field. Selecting Yes will trigger a drop-down series of questions pertinent to details about the equipment and/or material involved.

Staff type initiating the report

This is a mandatory field that documents the role of the person submitting the report. This field provides multiple roles and fulfills the requirement for the Accreditation Council for Graduate Medical Education tracking for staff and resident patient safety reporting. It also provides a means to look at trends in reporting.

Are there other people with information on this event?

If Yes is selected, the field *Other People with Information* should be filled out to identify people with information concerning the event.

Other People with Information

If Yes is selected in the field *Are there other people with information on this event*, the Reporter must add the following information:

Last Name – This is a mandatory, self-explanatory free text field

First Name – This is a mandatory, self-explanatory free text field

Work area – This is a free text optional field that allows the Reporter to enter the work area in which the individual with knowledge of the event works.

Telephone – This is an optional field for the Reporter to include the phone number of the individual with knowledge of the event.

E-mail – This is an optional field for the Reporter to include the e-mail of the individual with knowledge of the event.

Figure 9 JPSR Screenshot – Required Information

Multiple people with knowledge of the event must be included in the same free text box if necessary.

Are there any documents to be attached to this record?

Allows the Reporter to add pertinent documents to the report by clicking on the checkbox. This opens a New Document section. **Only PDF files are allowed by business rule.** The maximum allowable size limit is 10MB. **Do NOT** attach any executable files. Attached files are only visible at the MTF level. Checking the box will trigger a Document section with pertinent instructions on how to add a document to the record.

Triggered Sections

Patient Involved Details

This section is triggered if the question **Was a patient involved** is set to Yes

Last Name

This is a mandatory free text field.
Enter the patient's last name.

First Name

This is a mandatory free text field.
Enter the patient's first name

Gender

This is an optional field with choices *Male*, *Female* and *Unknown* for circumstances where the gender of the patient is unknown.

Date of Birth

This is a mandatory date field that can be entered in mm/dd/yyyy format or via the use of the calendar icon. Completion of this field automatically calculates the AGE of patient field for all patients one year of age or older. For patient less than one year, it will display a zero (0).

Status

This field is an optional drop-down field.

Notes

This is an optional free text field that can support over 2000 characters. All Notes are visible only within the facility. They are not visible to Regional, HQ or enterprise-level users.

Add Another Button

Selecting the Add Another opens up an additional Patient Involved section to add an additional patient(s) to the report if required.

The screenshot shows a form titled 'Patient Involved Details'. It contains the following fields and labels:

- * Last Name**: A text input field.
- * First Name**: A text input field.
- Gender**: A dropdown menu.
- * Date of birth (MM/dd/yyyy)**: A text input field with a calendar icon.
- The Age (years) field below will calculate after you save this event.**: A note below the date field.
- For patients under 1 year of age, the Age (years) will be 0.**: A note below the age field.
- Age (years)**: A text input field.
- * Status**: A dropdown menu.
- Notes**: A large text area with a scroll bar.

Figure 10 JPSR Screenshot -Details

Medication

This section is triggered if the question Was this a medication event is set to Yes. Due to the numbers of individual medications involved in medication events, much of the aggregation of medication events is done utilizing the therapeutic class of drugs.

Stage of process

This is a mandatory field that documents wherein the process (from purchasing through administering the medication), the medication event occurred.

Search for drug involved

This is the most important field in the medication section. This should be used to enter the drug involved as it automatically and correctly completes the majority of the medication fields for the user.

Steps to search:

1. Enter a minimum of four (4) characters of either the generic or brand/trade name of a drug
2. Click the Search button
3. A pop up will appear with available options
4. Click the Choose button to select the appropriate medication.

Figure 11 JPSR Screenshot – Drug Section Details

Matching Medication					
	Generic name	Brand	Manufacturer	Type	Class
Choose	capsaicin-menthol	Aleveer	PHARMACEUTICS C	Rx	Dermatological - Irritants-Counter-Irritants
Choose	naproxen sod-pseudoephedrine	Aleve Cold & Sinus	BAYER INC.	OTC	Respiratory Combinations
Choose	naproxen sod-pseudoephedrine	Aleve Sinus & Headache	BAYER INC.	OTC	Respiratory Combinations
Choose	naproxen sod-pseudoephedrine	Aleve-D Sinus & Cold	BAYER INC.	OTC	Respiratory Combinations
Choose	naproxen sod-pseudoephedrine	Aleve-D Sinus & Headache	BAYER INC.	OTC	Respiratory Combinations
Choose	naproxen sodium	Aleve	BAYER INC.	OTC	Analgesic, Anti-inflammatory or Antipyretic - Non-Narcotic

Figure 12 JPSR Screenshot - Medication Search Popup

Selecting a medication through search will automatically fill out the generic name, brand name, manufacturer, therapeutic class and type of drug, whether it is a prescription drug or over-the-counter drug, and whether it is a controlled substance. Since it is a search field, it technically cannot be a mandatory field. If search is not used the Reporter must manually complete the Generic name of drug involved field

Generic name of drug involved

This is a mandatory field that must be completed if the search field is not utilized. ***To avoid error, use the Search for drug involved functionality.*** This is a free text field and is subject to error if completed manually.

Form

This is an optional drop-down list. It is not completed automatically by the Search for Drug Involved function.

Dose and Strength

This is an optional free text field. It is not automatically completed by the Search function

Route

This is an optional drop-down list. It is not automatically completed by the Search function.

NDC and Lot Number

This is a free text field the Reporter can use to record the specific National Drug Code and lot number if desired. It is not mandatory.

The Reporter can use the *Add Another* button on the lower left-hand side of the section to add additional medications as necessary.

Equipment/Materiel Details

This section is triggered if the question **Was equipment/material involved** is set to Yes. This section allows the Reporter to enter in information related to any equipment that may have been involved in the event.

Product type

This is a mandatory drop-down field allowing the Reporter to identify the type of equipment/materiel involved.

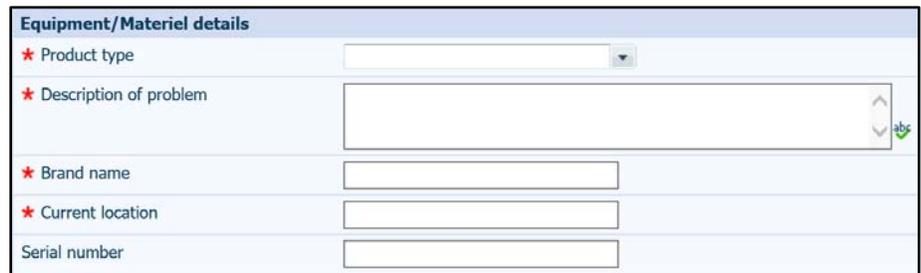


Figure 13 JPSR Screenshot – Equipment/Material Detail

Description of the problem

This is a mandatory free text field that allows the Reporter to provide a description of the issue.

Brand name

This is a mandatory free text field for the Reporter to identify the brand name of the equipment/materiel.

Current Location

This is a mandatory free text field for the Reporter to enter the location of the piece of equipment/materiel involved in the event.

Serial Number

This is an optional field where the Reporter can enter the Serial number if available.

Attached Document Details

This section is triggered if the question Are there any documents to be attached to this record is checked. This section allows the Reporter to upload documents to be attached to the record. Attached files are only visible at the MTF level.

Steps to Attach a document:

- Step 1: Select the type of document that you want to attach from the **Link as**
- Step 2: Add a **Description**
- Step 3: Click the **Browse...** button to locate the file

Only PDF file extensions are permitted. The maximum allowable size for attachments is 10MB.

DO NOT ATTACH EXECUTABLE FILES.

Link as

This is a mandatory field that has only one choice: Portable Document Format (PDF).

Description

This is a mandatory free text field for the Reporter to include a short description of the document that has been added.

Attach this file

To attach a document, the Reporter should select the Browse button to the right of the field to find the file in the application to attach a document to the event report.

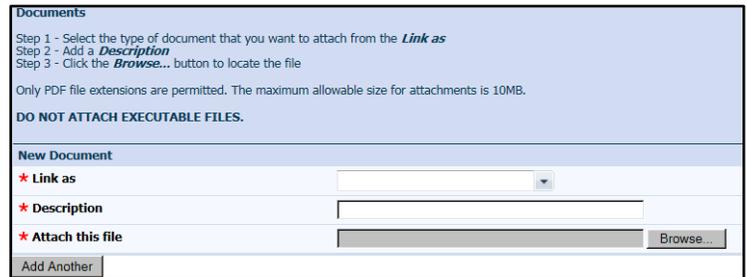


Figure 14 JPSR Screenshot - Documents

Details of Person Reporting Event

This is not a mandatory section. It is encouraged

Reporter's Last Name

This is NOT a mandatory field. As with all other name fields in the sections above, this is a free text field where the Reporter may choose to disclose his/her last name.

Reporter's First Name

This is NOT a mandatory field, but is a free text optional field where the Reporter may choose to disclose his/her first name.

Status

This is an optional structured text drop-down list for the to choose to disclose his/her category.

Status detail

This is an optional structured text drop-down list to allow the Report to choose to disclose his/her role.

E-mail

This is an optional free text field to allow the Reporter to disclose his/her DoD e-mail address. This

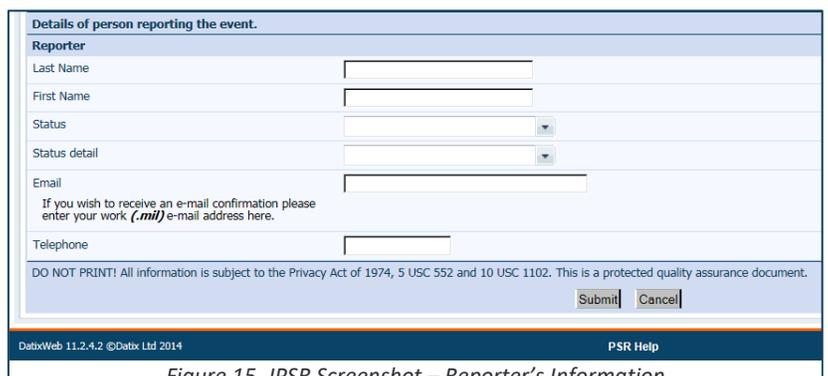


Figure 15 JPSR Screenshot – Reporter's Information

will allow the Reporter to receive a confirmation e-mail once the DIF1 is submitted.

Telephone number

This is an optional free text field to allow the Reporter to include his/her telephone number. This field will allow the PSM or the investigator(s) to contact the Reporter in the future if additional detail is needed.

Submitting the Record

At this point, the Reporter should review his/her input into the report. The Reporting form (DIF1) is a singular dynamic form. Since DoD has chosen to allow anonymous reporting, there is no option as a reporter to save and come back to the report later. The Reporter must complete and submit the report in one sitting. If the ability to complete the form is an issue it is suggested that the Reporter provide a comprehensive Event Description which will allow the PSM/Handler/Investigator(s) to complete the report more fully during the investigation. The Reporter can then select the **Submit** button to submit the entire report.

CHAPTER 3: Investigating Events

The Investigation form (DIF2) is used for the review and investigation of Patient Safety Events in JPSR. The Investigator form (DIF2) requires the User to have access and log-in credentials. This level of access is reserved for those individuals who will be reviewing, investigating, editing, changing, approving and finalizing events.

Levels of access within these activities are dependent on the User’s assigned role. All actions taken on the Investigator form (DIF2) are audited by the system and are attributed to the User adding information or editing information. In other words, on the DIF2 there is a complete audit log (i.e., trail) of actions. These actions can be viewed via the “Audit Trail” functionality.



Figure 16 JPSR Workflow Following Event Submission

Note: Investigation Form (DIF2) actions are not anonymous. Unlike the Reporting Form (DIF1), the Investigator form (DIF2) information can be saved incrementally at any time by the User, who also has the ability to enter Patient Safety Events from the logged-in functionality; however, it will not be reported anonymously. To report anonymously, the User would need to log out first.

The Event Reporting landing page provides a snapshot-at-a-glance of his/her number of events s/he has in the various Status including those events that are overdue (>14 days from the reported date). The status displayed on the Homepage is dependent on the User’s access level.

Figure 17 JPSR Screenshot – Logged-in Homepage

By selecting a particular Status, a listing of the events within that Status is displayed. The PSM can then sort the events within the Stage by clicking on the headings (i.e., JPSR#, ID#, Event Date, Reported Date or Event Type) to sort the events as desired. Clicking on an event will open the Investigation Form (DIF2).

PSR #	ID	Event date	Reported date	Event type	Event Description
PSR-10910	53112	01/13/2015	01/13/2015	Care Management Events	Datena Test 01/13/2015
PSR-10909	53111	01/13/2015	01/13/2015	Care Management Events	Test Datena 01/13/2015

Figure 19 JPSR Screenshot – Desktop Header Events within a Particular Status

The Investigation Form (DIF2) contains very important information on the details of the event such as Degree of Harm, Duration of Harm, Event Type, Event Sub-type, Event Detail as well as Contributing Factors, all of which are extremely important in trending and analyzing aggregated data at the MTF, Service HQ and enterprise levels. ***It is important that thought is given when completing these fields as they provide the basis for identifying the trends.*** From this action, initiatives can then be developed and measured.

On the left-hand side of the Investigation Form (DIF2) is a menu that contains the sections of the report as well as Menu, Save and Cancel buttons. This menu can be used to quickly move to specific sections of the form rather than scrolling through every section. It also has printing capabilities. ***However: by business rule, printing is discouraged to prevent the filing of reports in multiple areas within the MTF.***

This menu also contains two other sections of importance.

Show DIF1 Values

This section displays the original information entered by the Reporter. This is useful if a Reviewer or PSM wishes to see what was originally reported prior to additions that have been made during investigation of the event.

Audit Trail

This section displays the current status (or values) within the report, along with all editing and editing attributes with the date and time of all entries that have been changed.

- Name and reference
- Location
- Details
 - Event Classification
 - Medications
 - Equipment/Material details
- Notifications
- Documents
- Investigation
- Action Plan
- Feedback and general e-mail correspondence
- Contributing Factors
- Associated Events
- Notepad
- Contacts for this event
- Details of Rejection
 - Printer Friendly
- Show DIF1 values
- Audit trail
- + Add a new event
- + Copy
- Standard Report
- Design a report
- New search
- Saved queries
- Show staff responsibilities
- Help

Figure 18 JPSR Screenshot - Navigation Pane

In addition, this menu also allows the PSM, Handler, and Investigator to add a new event, copy an existing event, run a standard report, design a report, run a new search, pull-up saved queries and other functionalities as his/her individual role allows.

This chapter will cover those functions not addressed in previous chapters. See Figure 14 for an overview of the JPSR Workflow following event submission.

Rejecting Events

Rejecting events in the DoD process flow only takes place subsequent to the PSM’s initial review of Events Awaiting Review. If rejected by the PSM, the event remains in the system with a status of Rejected Event. Rejected events are only visible to the PSM at the facility level.

Name and Reference

Name

This mandatory free text field should default to the name of the patient involved if one has been entered on the DIF1. If no name has been entered on the DIF1, a name must be entered at this time. It is recommended that some type of standard be used for the naming convention for events not associated with specific patients so that they can be used for aggregation at the local level. This field is NOT visible outside the facility level.

Name and reference	
The Name is used as a label for the Event record. It is derived from the name of the patient involved: LASTNAME FIRSTNAME. If there is no patient, then the PSM will enter a name for the event.	
* Name	<input type="text"/>
DATIX ID	53110
Current approval status	Events awaiting review
* Approval status after save	Events awaiting review
PSR number	PSR-10908
Reported date (MM/dd/yyyy)	01/13/2015
Opened date (MM/dd/yyyy)	01/13/2015
Handler	<input type="text"/>

Figure 20 JPSR Screenshot – Name and Reference

DATIX ID

This is a system-generated number unique to the individual event. A new DATIX ID is generated for any copies made of the event.

Current approval status

This reflects the status at the present point in time within the JPSR workflow that the event is at the time it is being viewed.

Approval status after save

This is a mandatory drop-down list that is selected by the PDM/Handler or Investigator to change the status in the workflow the event will reflect once the event is saved.

PSR Number

This is a system-generated number assigned to the event. This number will remain with the original event and any subsequent copies made of the event.

Handler

This is an optional drop-down list of people in facility who have JPSR log-in access and who can, therefore, be assigned to manage the event. Only these individuals can be chosen to handle/manage the investigation of the event. As this is an optional field, please note assigning a Handler is recommended but not mandatory.

Location

Patient Status

This field becomes a mandatory field for the User to complete during initial review if it was not completed by the Reporter.

Details

The Details section of the Investigations Form (DIF2) contains two critical fields in the reporting of Patient Safety Events dealing with Degree of Harm and Duration of Harm. Each of these must be completed by the User during initial review and can be edited as more information is obtained during the investigation. These fields are based on the AHRQ Common Formats, a standardized reporting system for Patient Safety Organization reporting.

The screenshot shows two rows of form fields. The first row is labeled '* Degree of harm' with a question mark icon and a dropdown menu. The second row is labeled '* Duration of harm' with a question mark icon and a dropdown menu. Both fields are highlighted with a light blue border.

Figure 21 JPSR Screenshot – Degree and Duration of Harm [CRITICAL FIELDS]

Degree of Harm

This is a mandatory structured text drop-down list ranging from Unsafe Condition to Death for the User to select the assessment of the expected degree of harm to result once attempts to reduce the harm have been completed (e.g., resuscitation).

Duration of Harm

This is a mandatory structured text drop-down list for the User to select an assessment of the expected duration of the harm. Temporary Harm should not be used for any harm condition when the patient is not expected to return to baseline. This field also contains choices for Unknown if the duration is initially not known or is not applicable for events classified of a severity of no harm or less.

The screenshot shows a form with five rows. The first row is 'Root cause analysis?' with a dropdown menu set to 'Yes'. The second row is 'RCA Reference Number' with a text input field. The third row is 'Sentinel Event?' with a dropdown menu set to 'Yes'. The fourth row is 'Sentinel Event Number' with a text input field. The fifth row is 'Date The Joint Commission notified' with a date picker icon.

Figure 22 JPSR Screenshot – RCA, SE and AAAHC Documentation Fields [Important for Cross Reference]

Root cause analysis

This is an optional Yes or No field where the User can indicate whether an RCA was Warranted or Completed. If the question is answered Yes, a field opens for the PSM to enter the RCA reference number:

RCA Reference Number

This is an optional free text field for the User to enter the RCA reference number. This field should be used so that events generating the need for an RCA can be cross-referenced to the JPSR report and number.

Sentinel Event

This is an optional Yes or No field for the User to indicate whether the event was a sentinel event as defined by DoD Health Affairs. If answered Yes, two additional fields are displayed.

Sentinel Event Number

This is an optional field; however, it is highly recommended to be used so that Sentinel Events and RCAs associated with the event can be cross-referenced with the JPSR Report and Number

Date TJC Notified

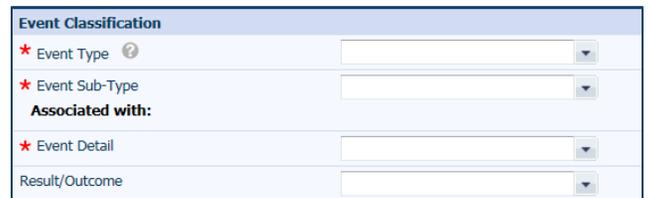
This is an optional date field to enter the date The Joint Commission (TJC) was notified if TJC mandated the event be reported. It may or may not be necessary to complete this field depending on whether a TJC event or other policy mandated Sentinel Event has occurred.

Event Classification

The Event Classification section of the Investigation Form (DIF2) includes three additional critical mandatory fields: (1) Event Type, (2) Event Subtype, and (3) Event Detail. These fields are loosely based on AHRQ Common Formats, but also contain all events deemed Sentinel Events by the TJC, as well as all National Quality Forum (NQF) Serious Reportable Events. These definitions are considered Sentinel Events by DoD Health Affairs and are based on what the patient experienced. Additional Event Subtypes and Event Details have been included to more completely classify events which are not classified by TJC or NQF as Serious Reportable Events and TJC defined Sentinel Events. A complete hierarchical listing of all choices is attached in the appendix to this guide.

Event Type

This is a mandatory structured text drop-down list consisting of six (6) choices. The event type chosen determines the choices for Event Subtype and Event Detail.



Event Classification	
* Event Type ⓘ	<input type="text"/>
* Event Sub-Type	<input type="text"/>
Associated with:	
* Event Detail	<input type="text"/>
Result/Outcome	<input type="text"/>

Figure 23 JPSR Screenshot – Event Classification
[CRITICAL FIELD]

Care Management Events

Major category of clinical events other than surgically related events

Environmental Events

Burns, shocks, gas delivery, restraints or bedrails

Patient Protection Events

Elopement, discharge to unauthorized persons, suicide, attempted suicide

Potential Criminal Events

Assaults, abduction, impersonation of medical personnel,

Product or Device Events

Deals with defects in products (including medication defects) or devices or intravascular air embolism

Radiologic Events

Radiological related events

Surgical, Invasive Procedure or Anesthesia Events

Wrong site, wrong patient, retained foreign object, anesthesia events

Event Sub-type

This is a mandatory structured text drop-down list that provides additional specificity to the event type selected above

Event Detail

This is a mandatory structured text drop-down list that provides detailed specificity on the event type.

Result/Outcome

This is an optional structured text drop-down list used to identify the outcome of an event.

Investigation

The Investigation section allows the investigators to document their process and findings.

Investigators

Only staff with a JPSR log-in may be chosen to be an Investigator. The second box allows the User to identify Investigators. The Handler or PSM uses the second box in in the screenshot above to select the investigator(s) by clicking the dropdown arrow or typing a fragment of the desired investigator's name. The Handler or PSM then selects the investigator by double clicking on the name. The selected investigator will then display in the top box. Additional investigators can be selected in the same manner. The first box identifies the people assigned to investigate the event and allows previously-identified Investigators to be deleted. Again, only staff with JPSR log-ins may be added.

Date investigation started

This is an optional field for the date when the investigation began in mm/dd/yyyy format or via the use of the calendar icon. |

PSM instructions to investigators

This is an optional free text box that allows the User to outline instructions to the Investigators. It can support over 2000 characters.

Actions taken

This is an optional free text field for the Investigators to document their actions taken to reduce the likelihood of the same event type taking place again. This field supports over 2000 characters.

Date investigation completed

This is an optional date field to document the date the investigation was completed in mm/dd/yyyy format or via the use of the calendar icon.

Outcome of the investigation

This is an optional structured text drop-down list that allows the Investigator(s) to identify the outcome of the investigation.

Further inquiry

This is an optional structured text drop-down list that allows the Investigator to document whether any additional review post-investigation is needed, or whether a Quality review, Standard of Care Review or Other Review is/should be required.

Lessons learned

This is an optional free text field that allows the Investigator to document any ‘lessons learned’ that resulted from the event investigation. This field can support over 2000 characters.

Risk Assessment Matrix

JPSR uses the Probability/Severity matrix used by the Veterans Health Administration. Use of this matrix is optional but does allow the Investigator to assess the likelihood and potential consequences of the error happening again, including its potential future impact. The User selects the categories s/he believes most accurately denote the probability and severity, and the system assigns a “Risk Assessment Grade” of High, Significant and Low. This matrix can be quite useful as aggregation is possible using the matrix fields for trending and analysis reporting at the local, Service HQ, and enterprise levels.

Lessons learned ⓘ
Please click on the question mark for examples of lessons learned.

Risk Assessment Matrix: ⓘ

Probability of recurrence (likelihood)	Severity on Patient and Facility (consequence)			
	Catastrophic	Major	Moderate	Minor
Frequent - Likely to occur immediately or within a short period (may happen several times in a year)	●	●	●	●
Occasional - Probably will occur (may happen several times in 1 to 2 years)	●	●	●	●
Uncommon - Possible to occur (may happen sometime in 2 to 5 years)	●	●	●	●
Remote - Unlikely to occur (may happen sometime in 5 to 30 years)	●	●	●	●

Risk Assessment Grade:

Figure 24 JPSR Screenshot – Investigation Section

Action Plan

The Action Plan section is an optional section that allows the PSM, Handler or Investigators to develop and document a Plan of Action for the event, including efforts made to preclude the same types of event from reoccurring. To open a new Action Plan, the User selects the Create a new action at the bottom of the Action Plan section. It will then display once a new Action Plan is initiated. Although the Action Plan is optional, once an Action is created, there are two required fields.

Action Plan

Use the *Create a new action* link below to structure an Action Plan for this event.

An Action Plan can be used to help structure the investigation or to implement corrective measures to try and prevent this type of event occurring in the future.

No actions.

[Create a new action](#)

Figure 25 JPSR Screenshot – Action Plan, No Actions yet

Action Details

Action ID

Priority

Type

★ Description

Start date (MM/dd/yyyy)

Due date (MM/dd/yyyy)

Assigned by ("From")

★ Responsibility ("To")

Details / Instructions

Resource requirements

Reporting/Monitoring requirements

Progress

Completed date (MM/dd/yyyy)

Completed by

Record

Linked record ID 53110

Figure 26 JPSR Screenshot – Action Plan, Creating a new Action

Action ID

This is a system-generated ID number.

Priority

This is an optional structured text drop-down list that documents the priority of the Action Plan.

Type

This is an optional structured text drop-down list identifying Action type.

Description

This is a mandatory free text description of the Action taken.

Start date

This is an optional date field to document the date the Action Plan was started in mm/dd/yyyy format or via the use of the calendar icon.

Due date

This is an optional date field to document the date the Action Plan must be completed by in mm/dd/yyyy format or via the use of the calendar icon.

Assigned by

This is a system-generated field listing the Assigning Official

Responsibility

This is the Action Officer who is responsible for the completion of the Action Plan. It is a mandatory field with choices of those staff members who have JPSR log-in privileges.

Details/instructions

This is an optional free text field for the User to include detailed instructions for completing the Action Plan. It can support over 2000 characters.

Resource requirements

This is a field to determine resources required to conduct the Action Plan as well as the Action outlined in the Action Plan. It is an optional field supporting over 2000 characters.

Reporting/monitoring requirements

This is an optional free text field outlining the reporting and monitoring required, including any milestones, for completion and/or implementation of the Action Plan. It can support over 2000 characters.

Progress

This is an optional free text field that identifies the progress in completing the Action Plan and Action. It supports over 2000 characters.

Completed date

This is a non-mandatory date field to document the date the Action Plan has been completed in mm/dd/yyyy format or via the use of the calendar icon.

Completed by

This is a structured text drop-down list pre-populated with those individuals' names within the User's facility with JPSR log-ins privileges.

Record

This is the system-generated record number

Linked record ID

This references the DATIX ID number of the event for which the Action was undertaken.

Feedback and General E-mail Correspondence

This section allows the User to send messages to linked contacts (i.e., those individuals with JPSR log-in privileges) and additional recipients as necessary.

When including additional recipients, the User should use only official military e-mail addresses. ***IT SHOULD BE NOTED THAT THIS MESSAGING SYSTEM DOES NOT HAVE THE SAFEGUARDS (I.E., NOT ENCRYPTED) THAT DOD REGULAR E-MAIL CONTAINS AND SHOULD BE USED WITH CAUTION IF AT ALL.*** The

message history keeps a list of all messages sent via this functionality, and is shown at the bottom of this section.

Feedback and general e-mail correspondence

When sending a message, copy and paste the URL into the body of the message - this will provide the recipient with a direct link to this event.

Recipients
Only linked contacts with e-mail addresses are shown.

Additional recipients
Enter e-mail addresses of other recipients not listed above. You can enter multiple addresses, separated by commas.

Subject of message
Patient Safety Reporting feedback message (FOUO) (10 USC 1102)

Body of message
This is a feedback message from (PSM) Mike Datena. Incident PSR number is PSR-10908.
The feedback is:

Please go to

Send message

Date/Time	Sender	Recipient	Body of Message
No messages			

Figure 27 JPSR Screenshot – Feedback and Correspondence

Contributing Factors

Contributing Factors

The PSR includes a Contributing Factor(s) section that permits identification of conditions or circumstances that contributed to or caused (or reasonably believed to have caused/contributed to) a patient safety event or near miss. The purpose of this list is to identify the "reasons", conditions or causes that can be linked to why/how an event occurred, so that you can identify and implement interventions that would prevent or reduce the event from recurring.

Instructions: To add contributing factors to this event, select Yes in the drop down list next to the question "Were there any Contributing Factors?". A new section will display for selecting Contributing Factor Groups and associated Contributing Factors. There may be many contributing factor(s) for an event or near miss. Ask yourself questions like: How did the event occur? What, if any, safeguards broke down in the process to contribute or cause the event? Scan all items in the list and select the most significant factor(s) that relate to the specific event or near miss. To add more than one Contributing Factor, click on the Add Another button. Report other factors not captured in the lists in the narrative section of your report.

Be thoughtful when identifying contributing factor(s). Choosing too many may not allow you to focus your efforts towards building applicable corrective actions that would have an impact on factors that could eliminate or reduce the chance of recurrence. The goal is to establish **useful** data that you can use for identifying problem areas, trends, and subsequent interventions.

Were there any Contributing Factors?

Contributing Factors

Contributing Factors Clear Section

Order:

Contributing Factor Groups

Contributing Factors

Add Another

Figure 28 JPSR Screenshot –Contributing Factors Group and Individual Contributing Factors

Contributing factors are important to identify. Their identification is critically important to the value of the JPSR report. The Contributing Factor(s) section permits identification of conditions or circumstances that contributed to or caused (or are reasonably believed to have caused/contributed to) a Patient Safety Event or near miss. The purpose of this list is to identify the "Reasons," "Conditions," or "Causes" that can be linked to why/how an event occurred, so that a User can identify and implement interventions that would prevent or reduce the event from recurring at a facility. The Contributing Factors section is a two-tiered hierarchy with individual contributing factors nested under major

groupings. Contributing Factors is one of the major aggregating fields which can help the MTF-leadership determine what may be causing problems leading to events in his/her facility, and can therefore develop initiatives related to these findings to reduce event occurrences.

Were there any contributing factors

This is an optional Yes or No structured text field. Answering Yes opens up four (4) subfields:

Order

This is an optional free text integer-only group that allows the User to rank and order multiple contributing factors based on importance.

Contributing Factor Group

This is an optional structured text drop-down grouping of eight (8) major contributing factor groups from which the User can choose.

Contributing Factors

This is an optional structured field drop-down list identifying the individual factors impacting the event.

Other Contributing Factors

This is an optional free text field for the User to provide contributing factors that are NOT included in the structured text contributing factors above

The Add Another button on the lower left of the section allows the User to add additional contributing factors groups and individual factors as needed.

Associated Events

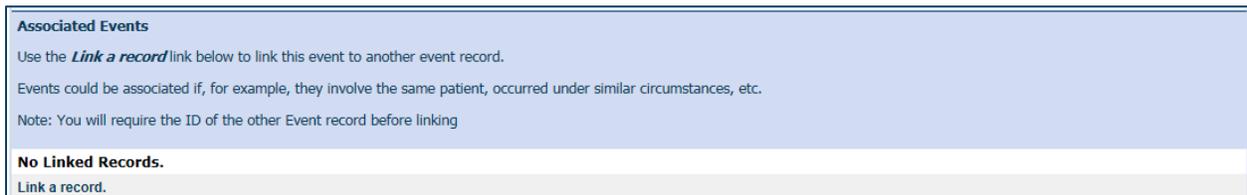


Figure 29 JPSR Screenshot – Linking Events

The Associated Events functionality allows the User to link this event to the record of another event if they are somehow related (e.g., very similar in nature, happened to the same patient etc.). To link a record, the User must click on the Link another record hyperlink in the lower left-hand side of the section, which will open a subsection. **NOTE: all copied records will be automatically link to the original record.**

Module

If the User chooses to link a record, the section in Figure 29 will open. This is a mandatory structured text drop-down list with two choices in



Figure 30 JPSR Screenshot – Linking Event Details

JPSR referring to the modules the DoD has purchased: (1) Event Reporting and (2) Hotspots (*Not yet activated*)

ID

This field refers to the event the User is linking to. The User must have the DATIX ID number for the event s/he wishes to link to.

Link Notes

This is an optional free text field allowing the User to include any notes pertinent to the linked events. It allows over 2000 characters.

Notepad

The Notepad section contains a PSM Notepad and a Reviewer (or Handler) Notepad for notes about the event from the PSM and/or the Reviewer (Handler). These are both optional free text fields that allow over 2000 characters in each notepad. As with all other “Note” entries, these are only visible at the local level. The PSM Notepad however, is only visible to the PSM.

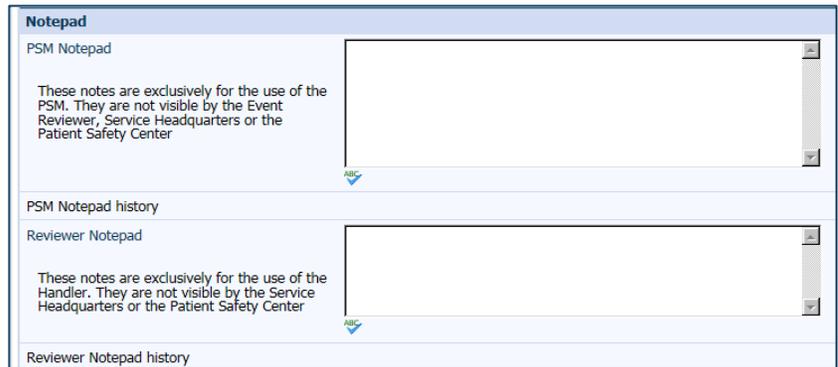


Figure 31 JPSR Screenshot – PSM and Reviewer Notepads

People Affected

Contacts for this event
 An Approval Status of "Unapproved" next to any of the individuals listed below indicates that the Contact has yet to be verified.
 In order to verify a Contact:
 1. Click the **Save** button at the bottom of the form;
 2. Click onto the contacts name below;
 3. Scroll to the bottom of the form and click the **Check for matching contacts** button;
 4. If there is an appropriate match, click **Choose**. If not, click **Cancel**;
 5. Click the **Create new link** button.

VERIFYING CONTACTS IS ONE OF THE MOST IMPORTANT PARTS OF THE SYSTEM - PLEASE ENSURE THAT ALL CONTACTS ARE CHECKED BEFORE THE RECORD IS GIVEN FINAL APPROVAL.

People Affected						
Approval status	Title	First Name	Last Name	Status	Link role	Age
Unapproved		Donald	Duck		Patient involved/harmed in event	80

Create a new Person Affected link

Other Contacts
No Other Contacts
 Create a new Other Contact link

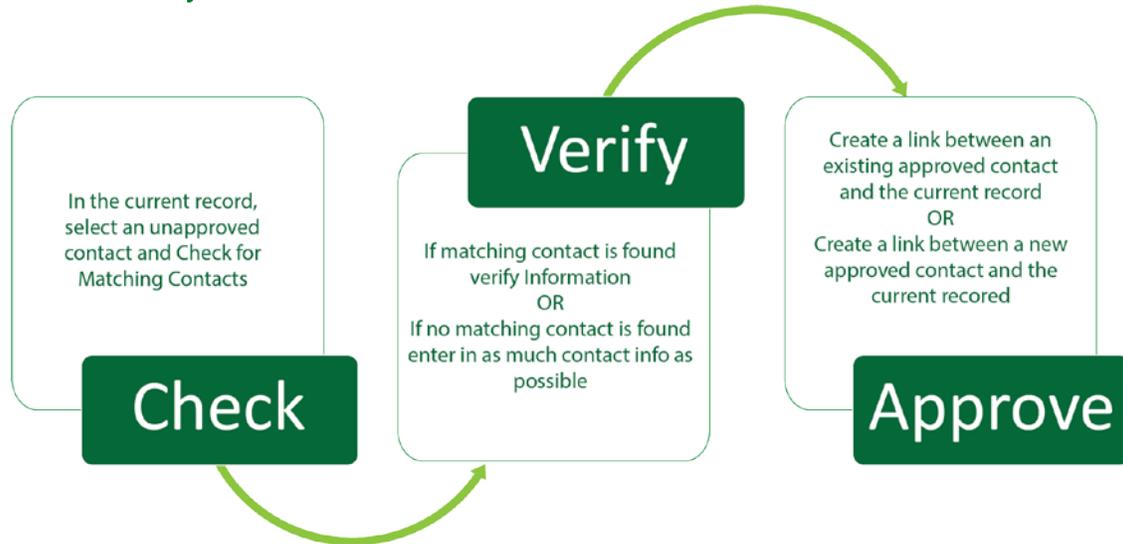
All information is subject to the Privacy Act of 1974, 5 USC 552 and 10 USC 1102. This is a protected quality assurance document.

Figure 32 JPSR Screenshot – Approving an Unapproved Contact

This section allows the PSM and/or Handler/Reviewer to add additional people affected by the event (e.g., patient). The fields are the same as the fields in the *Patient Involved* section of the Reporting Form (DIF1). They will display as either *Unapproved* or *Approved* and these contacts **should be verified**.

Once verified, the event will link the person affected to the event, as well as any other events s/he may have been involved in at the MTF. This section also helps the User keep his/her contact file accurate with minimal to no duplications.

Process to Verify a Contact



Steps to Verify an Existing Contact

1. Click the Unapproved contact. This will open up a contact record page with information on the unapproved person affected that has been carried over from the Reporter Form (DIF1).
2. Click on the Check for Matching Contacts button at the bottom of the page. This will bring up a list of all contacts that could be a match.
3. Review the list and select the correct contact by pressing the Choose button.

Matching contacts										
2 contacts found. Displaying 1-2.										
	Approval status	Title	First Name	Last Name	Status	Link role	Staff number	Job Title	Date of birth	ZIP Code
Choose	Approved		Donald	Duck					01/01/1954	
Choose	Approved		Donald	Duck						

Figure 33 JPSR Screenshot – Checking for Matching Contacts

4. If a match is found, the system will subsequently update all fields with the approved contact information and the Approval Status will be set to Approved.
5. Click the Create New Link Contact button at the bottom of the screen to link the contact record to the current Event record.

Steps to Verify a New Contact

1. Click the Unapproved contact. This will open up a contact record page with information on the unapproved person affected that has been carried over from the Reporter Form (DIF1).
2. Click on the Check for Matching Contacts button at the bottom of the page. This will bring up a list of all contacts that could be a match.

3. If no matches are found, or if the contacts listed are not a match, click cancel to return to the Contact record.

Matching contacts										
2 contacts found. Displaying 1-2.										
	Approval status	Title	First Name	Last Name	Status	Link role	Staff number	Job Title	Date of birth	ZIP Code
<input type="button" value="Choose"/>	Approved		Donald	Duck					01/01/1954	
<input type="button" value="Choose"/>	Approved		Donald	Duck						

Figure 34 JPSR Screenshot – Checking for Matching Contacts

4. Fill in all known information about the contact, including the mandatory fields of Parent MTF and MTF.
5. Manually change the Approval Status to Approved and save the contact record
6. Click the Link Contact button at the bottom of the screen to link the contact record to the current Event record.

Resource Information

To supplement this user guide, JPRS provides web-based training accessible to CAC users through Joint Knowledge Online, an enterprise learning management system.

Visit [Joint Knowledge Online - JPSR Community Page](#)