The Problem

- Incident Reviews, root cause analyses, and site visits from regulatory agencies often lead to interventions and corrective action plans.
- Actions are assigned to multiple individuals with differing metrics and due dates.
- There was no good system to track these items to ensure they are completed on time and as planned.

Aim/Goal

The goal of this project was to design a database that could be used to track open action items from these multiple sources.

The Team

- Rohn Friedman, MD, Psychiatry
- Stephenie Loux, MS, Psychiatry
- Greg Ludlow, Ed.D., Psychiatry

The Interventions

- Identified key elements needed for the database
- Created a form for entering data into the database
- Developed automated reports, including reports that could be filtered by primary staff responsible, source of the action item, and action items past due
- Established a process to send each individual with open action items a report of all items assigned to him or her across multiple reviews and to receive monthly updates for any open action items

The Results/Progress to Date

Lessons Learned

- The ability to filter and personalize reports by using a database is much more powerful than trying to track items in Excel.

Next Steps/What Should Happen Next

- Create a related table and report in the database that identifies action items needing ongoing monitoring.
- Develop an automated system to request intervention progress and completion dates and to update the database accordingly.