

# Documenting Your Organization's Patient Safety Evaluation System (PSES)

PSES Documentation Considerations	Completed
<ul style="list-style-type: none"> <li>Develop PSES organizational chart (includes health system coordination)</li> </ul>	<input type="checkbox"/>
<b>Workforce</b>	
<ul style="list-style-type: none"> <li>Develop grid with job titles, responsibilities and level of access to PSWP and purpose</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Identify 2 key contact roles for PSO</li> </ul>	<input type="checkbox"/>
<b>Description of the following:</b>	
<ul style="list-style-type: none"> <li>PSES Workforce training plan</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Non-PSES workforce employees and providers training plan</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who can enter SI event reports into the PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who can conduct additional investigations within PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who conducts proactive risk assessments within PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who collect any data outside of SI or conducts deliberation, analysis and documents date</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who reviews data after it enters PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who can remove data from PSES before reporting to PSO and record date</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who can report to the PSO and record date reported</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who can functionally report to PSO and record date</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who has access to the functionally reported drive (PSO and internal)</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who can conduct analyses/deliberations within PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who disseminates non-identifiable PSWP</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who determines non-identifiable SPWP</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Who may disclose PSWP</li> </ul>	<input type="checkbox"/>
<b>Equipment/software</b>	
<ul style="list-style-type: none"> <li>Safety intelligence software environment –define what is PSWP and what is not</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Secure functional reported drive within PSES and who has access</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Secure PSES drive and who has access</li> </ul>	<input type="checkbox"/>
<b>PSWP</b>	
<ul style="list-style-type: none"> <li>Describe how PSWP can be shared across health system and disclosed amongst affiliate providers if applicable</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe how PSWP is maintained within PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe data collected (consider data inventory)</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe who can access PSWP for operation of PSES and/or interactions of PSES</li> </ul>	<input type="checkbox"/>
<b>PSES Operations</b>	
<ul style="list-style-type: none"> <li>Describe patient safety activities conducted</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe how additional deliberation and analysis may occur within PSES</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe how a copy of other data may be reported to PSO</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe how data may be used internally</li> </ul>	<input type="checkbox"/>
<b>Disclosure</b>	
<ul style="list-style-type: none"> <li>Describe how, when and by whom PSWP may be disclosed, disclosure form used, and record retention (minimum 6 years for provider disclosure)</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe what and how PSWP may be disclosed amongst affiliate providers</li> </ul>	<input type="checkbox"/>
<b>Functional reporting</b>	
<ul style="list-style-type: none"> <li>Describe agreement and how PSO has access</li> </ul>	<input type="checkbox"/>
<b>Physical space (if any)</b>	
<ul style="list-style-type: none"> <li>Describe dedicated office space</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Describe any physical storage files</li> </ul>	<input type="checkbox"/>
<b>Pertinent policies and other documents that might benefit from review</b>	
<ul style="list-style-type: none"> <li>Incident report</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Disclosure</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Confidentiality</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Record retention</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Discipline</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Possibly peer review</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Training</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Manager investigation</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>RCA</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Privacy and Security policy</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Confidentiality</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Risk Management Policies</li> </ul>	<input type="checkbox"/>