



ADVISORY: Detecting and Reporting Patient Safety Risks in Virtual Care Delivery

On September 23, 2021, the Academic Medical Center Patient Safety Organization (AMC PSO), in association with the Alliance for Quality Improvement and Patient Safety (AQIPS), hosted the first National Safe Table for PSOs on the topic of detecting and reporting patient safety risks associated with virtual care delivery. Thirty patient safety organizations were represented at this meeting and collaborated on this Advisory. A list of PSOs that attended the meeting is provided.

In preparation for the Safe Table convening, a brief survey of PSOs was conducted during the summer of 2021. The survey identified the top three patient safety concerns related to virtual care delivery:

- Diagnostic errors
- Failure of post-visit follow-up
- Technology issues related to disparities in access to virtual care

The Safe Table convening group also included patient and family representatives who reported their top patient safety concerns:

- Potential privacy and confidentiality gaps associated with the virtual care platform
- The need for careful provider assessment of patient signs/symptoms that indicate the need to convert a virtual visit to an in-person encounter
- Inequities of virtual care for patients with poor internet skills, limited English proficiency, and/or low health literacy
- Opportunities to use the virtual care platform to learn about patient environment and social determinants of health

Representatives from national patient safety associations, including AQIPS and the Society to Improve Diagnosis in Medicine (SIDM), attended. Government representatives were invited.

During the convening session, patient safety experts, including Dr. David Bates, Chief, Division of General Internal Medicine and Primary Care of Brigham and Women's Hospital and Medical Director, Clinical and Quality Analysis, Mass General Brigham, Dr. Steven Shook, Lead for Virtual Health of Cleveland Clinic, Dr. Tejal Gandhi, Chief Safety and Transformation Officer of Press Ganey, and Pat Folcarelli, Vice President of Patient Safety at CRICO presented illustrative cases, results of research, personal experiences, and commentary about the present state of virtual care safety reporting.

Few of the participating PSOs reported the development of formal safety/incident reporting systems to identify patient safety and quality events related to virtual care. Of the PSOs that have developed such systems, several have implemented innovative audit programs to learn from virtual care encounters, improve systems of care, enhance provider performance, and develop best practices. None of the participating PSOs reported use of administrative data as "trigger" signals to capture events related to virtual care; and no PSO reported regular use of patient satisfaction data reports or grievances related to virtual care as potential sources of patient safety information.



Recognizing that, “*We don’t know what we don’t know*”, the convening members recommended the following steps to begin the development of robust safety reporting to identify and capture adverse outcomes and near-miss events where virtual care was a contributing factor:

1. In causal analyses of patient safety and quality-related events, consider whether virtual care was a root cause or contributing factor for that event.
2. Where possible, employ natural language processing (NLP) to review safety reports for key words related to virtual care delivery.
3. Review patient satisfaction/provider feedback data to learn the patient and family perspective about perceived differences between in-person and virtual care. In particular, include specific questions on patient surveys to query whether the patient had a virtual visit, and if so, how the patient viewed the virtual care experience. Review of patient comments on surveys that offer specific feedback about virtual care may be helpful as a starting point to revise existing survey tools to capture virtual care issues.
4. Focus on the post-virtual visit follow-up processes to assess vulnerability for potential gaps in care with follow-up care plans relating to lab tests, imaging and specialty consults, especially relating to diagnostic evaluations.

The group agreed to reconvene within six months. Goals for the next convening will include a survey of the progress by PSOs and their members in developing robust safety reporting systems and patient survey tools to capture adverse outcomes, near-miss events, patient complaints, and disparities associated with virtual care, and the creation of consensus-based recommendations for best practices in virtual care safety reporting.



Virtual Care and Telehealth Resources

The National Safe Table program workgroup has compiled these resources as a supplement to the National Safe Table event and as a resource for supporting improvement efforts. The information provided in this document may be derived from several sources, such as relevant scientific and management literature, published best practices, standards and regulations, surveys and/or questionnaires to healthcare providers and healthcare organizations, and information from Patient Safety Organizations.

The contents of this document do not constitute legal advice. You should consult legal counsel for specific legal guidance and should develop clinical guidance in consultation with clinical staff.

[American Telemedicine Association – ATA](#)

[Agency for Healthcare Research and Quality \(AHRQ\)](#)

[AHRQ's Easy-to-Understand Telehealth Consent Forms](#)

[How to Obtain Consent for Telehealth](#)

[Issue Brief: Telediagnosis for Acute Care: Implications for the Quality and Safety Diagnosis](#)

[Introduction | Agency for Healthcare Research and Quality \(ahrq.gov\)](#)

[Interruptions and Distractions in Health Care: Improved Safety with](#)

[Mindfulness Expanding Telemedicine in the Age of COVID-19](#)

[Telehealth](#)

[Telehealth and Patient Safety During the COVID-19 Response](#)

[Telehealth for Acute and Chronic Care Consultations](#)

[Telehealth: Mapping the Evidence for Patient Outcomes from Systematic Reviews](#)

[Asking the Hard Questions About Telehealth | Agency for Healthcare Research and Quality](#)

[Telehealth for Acute and Chronic Care Consultations | Effective Health Care Program](#)

[AMC PSO | Patient Safety Guidance for the Virtual Visit](#)

[American Academy of Child and Adolescent Psychiatry | Telehealth Resource Center](#)

[American Academy of Family Physicians \(AAFP\) | A Toolkit for Building and Growing a Sustainable Telehealth Program in Your Practice](#)

[American Association of Critical-Care Nurses \(AACN\) | AACN TeleICU Nursing Consensus Statement](#) [American College of Emergency Physicians \(ACEP\) | Emergency Medicine Telemedicine](#)

[American Hospital Association \(AHA\) | Telehealth](#)

[American Medical Association \(AMA\)](#)

[Ethical Practice in Telemedicine](#)

[Telehealth Research & Key Resources: Guides & Resources](#)



Virtual Care and Telehealth Resources (con't.)

ASHRM

American Society for Health Care Risk Management (ASHRM) | Telemedicine Risk Management Considerations

Webinar: What Do Operations Managers Need to Know About Risk Management in Telehealth and Why?

ASHE Health Facilities | FGI Lays Out Telemedicine Guidelines

American Telemedicine Association | Practice Guidelines & Resources

Center for Connected Health Policy

State Laws and Reimbursement Policies

State Telehealth Laws and Reimbursement Policies Fall 2020

CDC | Telehealth and Telemedicine

ECRI *(requires an account)*

Telehealth: What's on Your Radar?

Telehealth

Telemedicine: The Future Is Here, When It Works

Ready, Set, Go - Telehealth.pdf

Challenges and Facilitators to Implementing Outpatient Real-time Videoconferencing Telehealth Services

How Can You Use Telemedicine to Provide Medication-Assisted Treatment for Opioid Use Disorder?

Increase in Telemedicine Use Brings Increased Cybersecurity Risks

Interactive Telemedicine Training Helps Providers Optimize Visits and Stay Compliant

Patient Safety Concerns Involving Mobile Health

Telehealth

Make a Plan: Telehealth

Welcome to the Future: AMA Updates Code of Ethics for First Time in 50 Years, Issue Guidance on

Telemedicine



Virtual Care and Telehealth Resources (con't.)

[Federation of State Medical Boards | Telemedicine Policies Board by Board Overview](#)
[FSMB | COVID-19](#)

[HealthLeaders | How Healthcare Providers Can Mitigate 3 Telehealth Risks](#)

[HealthIT.gov | Telemedicine and Telehealth](#)

[HHS | Telehealth: Resources For Providers and Patients](#)

[IHI | What to Say During Telehealth Visits with Older Adults](#)

[Institute of Medicine | The Role of Telehealth in an Evolving Health Care Environment](#)

[Interstate Medical Licensure Compact \(IMLC\)](#)

[Journal of Palliative Medicine. Webside Manner During the COVID-19 Pandemic: Maintaining Human Connections During Virtual Visits](#)

[Medicaid.gov | Telemedicine](#)

[NYSED.gov | Telepractice](#)

[NCSBN | Nurse Licensure Compact \(NLC\)](#)

[Pennsylvania Medical Society | Getting Started with Telemedicine: FAQs for Pennsylvania Physicians and Practices eVisit | State Telemedicine Laws, Telemedicine Parity Laws](#)

[Society to Improve Diagnosis in Medicine \(SIDM\): Improving Telediagnosis: A Call to Action](#)

[The Joint Commission | Quick Safety Issue 55: The Optimal Use of Telehealth to Deliver Safe Patient Care National Consortium of Telehealth Resource Centers](#)

[Guides, Checklists and Templates](#)

[Mid-Atlantic Telehealth Resource Center \(MATRC\) \(Pennsylvania & West Virginia\)](#)

[Northeast Telehealth Resource Center \(NETRC\) \(Connecticut & New York\)](#)

[Center for Connected Health Policy \(CCHP\)](#)

[Telehealth Technology Assessment Resource Center](#)

[The Doctor's Company | Your Patient is Logging on Now: The Risks and Benefits of Telehealth in the Future of Healthcare](#)



Participating Patient Safety Organizations (PSO's)

- A & M Rural and Community Health Institute (ARCHI), Texas
- Academic Medical Center (AMC) (*Host PSO*), Massachusetts
- AdventHealth - Quality Circle for Healthcare, Florida
- Alliance for Patient Medication Safety, Virginia
- Anesthesia Patient Safety Organization (ANPSO), New Mexico
- Center for Patient Safety, Missouri
- Cleveland Clinic Alliance for Patient and Caregiver Safety, Ohio
- Cohen Clinical Quality Institute, Maryland
- Collaborative Healthcare Patient Safety Organization (CHPSO), California
- CHART Institute LLC, Pennsylvania
- ECRI & Institute for Safe Medication Practices PSO, Pennsylvania
- Encompass Health, Alabama
- Enterprise Patient Safety Organization, LL CVS Health, Rhode Island
- Florida Academic Healthcare, Florida
- Garden State, New Jersey
- HCA PSO, Tennessee
- HPI Press Ganey, Virginia
- Kansas Clinical Improvement Collaborative (KCIC), Kansas
- Louisiana Alliance for Patient Safety, Louisiana
- Maine Primary Care (MePCA), Maine
- MHA Keystone Center, Michigan
- Midwest Alliance for Patient Safety, Illinois
- NAPA Anesthesia Patient Safety Institute, New York
- Safety Culture - Walmart Inc., Arkansas
- The Guthrie Medical Group, Pennsylvania
- Virginia PSO, Virginia
- Vizient, Illinois