



Introduction

- The ‘Trigger Review Method’ aims to support patient safety-related learning needs and improvement efforts within General Practice (1,2).
- Samples from high risk patient groups are screened for any potential ‘incidents’ or ‘latent risks’ that may be hidden within patient records.
- Within two hours, approximately 20-25 patient records can be retrospectively reviewed.
- Findings can inform improvements and any associated learning needs.

The Trigger Review Method

- Using a structured pro-forma clinicians review a batch of approximately 20 patient records from an identified patient group, and focus on identifying avoidable harm or other incidents of interest.
- For one review, eight to 12 triggers provide an optimal balance between sensitivity and feasibility (3).
- Examples of triggers can include:
 - o **Time of consultation** – Over three contacts with the practice in any given period of a week (this can include telephone calls, consultations with nurse/GP or home visits).
 - o **Place of consultation** – Any home visit, whether by the GP or by a nurse from the practice serves as a trigger.
 - o **Frequency of consultation** – Over 10 consultations for the period of the review (12 months).
 - o **Changes to medication** – Has any “repeat medication” been added or cancelled in the period under review?
- Once a trigger has been detected, the team reviews the record in more detail to determine if a safety critical incident exists.
- Any actions could include the identification of individual/team learning and development needs, and potential areas of improvement.

1. Plan and Prepare	2. Review Records	3. Reflection and further action
<ul style="list-style-type: none"> • What is the aim of the review? • What data should be collected? • Sampling: size and method? • Individual and team responsibilities? 	<ul style="list-style-type: none"> • Can triggers be detected? <ul style="list-style-type: none"> o No – review next record o Yes – Did harm occur? <ul style="list-style-type: none"> • No -continue to next trigger or record • Yes – summarise incident for severity, origin and preventability 	<ul style="list-style-type: none"> • Patient and medical records, e.g. audit • Practitioner level, e.g. learning needs • Practice team, e.g. share and reflect on findings • Primary-secondary care interface, e.g. consider appropriate feedback



Example Scenario (1)

- While scanning the medical record for the trigger 'Hb<10', a clinician discovers that an elderly patient on warfarin has not had her haemoglobin checked for at least five years. She discusses this with the practice nurse who adds this test during the patient's next phlebotomy appointment.

Summary

- The Trigger Review Method helps support immediate improvements, and the identification of patient safety related learning needs.
- It is an acceptable and feasible method of clinical audit, and can be used to address preventable harm in primary care.

References

1. de Wet C, Bowie P. Screening electronic patient records to detect preventable harm: a trigger tool for primary care. *Qual Prim Care*. 2011;19:115–25.
2. Bowie P, Halley L, Gillies J, Houston N, de Wet C. Searching primary care records for predefined triggers may expose latent risks and adverse events. *Clin Risk*. 2012;18(1):13–8.
3. de Wet C, Bowie P. The preliminary development and testing of a global trigger tool to detect error and patient harm in primary-care records. *Postgrad Med J*. 2009 Apr;85(1002):176–80.
4. McKay J, de Wet C, Kelly M, Bowie P. Applying the Trigger Review Method after a brief educational intervention: potential for teaching and improving safety in GP specialty training? *BMC Med Educ*. *BMC Medical Education*; 2013 Jan;13(1):117.

Use the Trigger Tool

- Driving Improvements in Healthcare: Implementation Evidence. Learning Briefing 3: Trigger Review of Electronic Patient Records in General Practice. NHS Education for Scotland, 2017.
- <https://www.biomedcentral.com/content/supplementary/1472-6920-13-117-S2.pdf> (4)
- <https://learn.nes.nhs.scot/Resource/View/685>
- <http://www.scottishpatientsafetyprogramme.scot.nhs.uk/programmes/primary-care/safety-culture/trigger-tool>



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