



BUYER'S GUIDE

2025 Safety Event Reporting

How to Choose the Right Safety Event Reporting System

Your guide to enhancing care and reducing risks in healthcare facilities

Implementing an effective safety event reporting system is a vital strategy for inpatient and outpatient facilities seeking to enhance care and decrease risks. These systems help quality, safety, and other teams maintain compliance with regulatory requirements through the efficient documentation and management of safety events. They also support a culture of continuous improvement by helping staff, clinicians, and leadership identify gaps within key departments

and across the organization, so that better strategies can be put in place to prevent future harm and improve patient outcomes. However, not every safety event reporting system is equally effective. This guide is designed to help your healthcare facility evaluate solutions and find an innovative system that empowers your staff and protects your patients. Here, you'll find the critical features and functions that make up a strong safety event reporting system.



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Integration, Implementation, and Training

Your facility's safety event reporting system should never become a burden for employees or IT staff. Seamless integration, easy implementation, comprehensive training, and timely support are key.

1 Integration

The system should integrate with your electronic health record (EHR), and it should be able to leverage multiple types of data — including patient demographics, medication orders, pharmacy orders, and lab results.

2 Configurability

The system should adapt to your processes and workflows, providing tailored event forms and enabling automated notifications and communication processes that align with your desired workflows.

3 Security

The system should adhere to current industry security standards, including data encryption in transit and at rest, role-specific privileges, compliance with third-party security attestations, and providing security audit reports. It should also undergo vulnerability and penetration testing multiple times per year from a reputable outside firm.

4 Accessibility

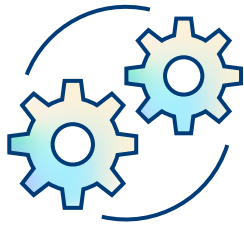
The system should be accessible via approved mobile devices, and it should support mobile viewing without requiring an app download. That way, staff can easily document and review events when they are connected to the network.

5 Training

The system's training program should include free live and on-demand training modules to ensure optimal use by existing staff and new staff. Role-based training should be provided to administrators (who manage and oversee the event reporting process) and investigators (who investigate events). Training materials should also be available to reporters (staff who report safety events), so everyone can report events appropriately.

6 Support

The system should provide a healthcare-experienced service and support team, including a main point of contact who rapidly responds to inquiries and requests. This contact should answer questions; assist with building custom forms, charts, and reports; and help explore additional capabilities when new needs arise.



Electronic Triggers for Safety Events

Also known as automatic event detection, electronic triggers reduce the likelihood of missed safety events, ensure a faster response, and decrease time spent entering data.

1 Automated identification

The system should leverage automatic safety event detection to provide a comprehensive capture of safety events that are occurring, potentially increasing capture of those events healthcare workers are most resistant to reporting. Automated detection results in fewer missed or unreported events for reasons such as staff forgetting to report, staff not reporting due to fear of punitive action, or staff failing to report in a timely manner. To enable this functionality, the system must be able to monitor EHR data — including data related to patient demographics, medication orders, medication administrations, lab results, radiology notes, and vital signs — and trigger events based on defined criteria.

2 Automated alerts

The system should enable the implementation of automated event routing or notifications when certain events are detected, providing opportunities for real-time conversations between safety team members and front-line workers.

Automated Event Detection In Action

The event reporting platform should use several criteria for automatic detection. For example, if the following criteria are met for Narcan, it should document a safety event automatically:

1. Narcan is administered to a patient who recently received morphine.
2. The patient has evidence of respiratory depression via a decrease in respiratory rate or oxygen saturation.
3. The patient is not currently located in a procedural area where the use of Narcan is more routine.





Health systems increasingly recognize that they must find ways to intervene more quickly when safety events occur. The longer the delay in intervention, the more likely it is a similar event will occur again. **Automated event detection and alerts keep patients safer because interventions can be made faster.”**

—Karen Biesack,
Senior Application Support Analyst,
Inovalon



Event Reporting

Configurable reporting forms, pre-populated data, and intelligent fields minimize time spent capturing events and enhance reporting accuracy.

1 Configurable forms

The system should provide forms tailored to your organization upon implementation with the ability to make adjustments as needed. This ensures it can quickly meet evolving needs and requirements.

2 Mandatory form fields

The system should enable easy configuration of mandatory fields within reporting forms, ensuring no critical information is missed.

3 Anonymous reporting

The system should have the option to enable anonymous reporting for all events or for specific types of events. This reduces the risk of undocumented events due to concerns among staff about punitive action.

4 Auto-populated demographic data

The system should automatically populate form fields with relevant patient and staff data to streamline reporting and enhance accuracy. Forms should take no more than five minutes to complete.

5 Intelligent field population

The system should dynamically adjust which fields are visible in the form as reporters enter information — creating a more intuitive, streamlined process to enter event details. For example, the “Name of Provider Notified” field should only appear after the user indicates that “Yes,” a provider was notified.

6 Smart logic

The system should use smart logic and analytics for keyword recognition to detect words and phrases and then associate them with a standardized table of risk terms. This enhances accuracy and grants visibility to key risk factors within the organization.

7 Attachments

The system should enable reporters to attach files — such as photos, videos, pdfs, audio, and more — to forms. This ensures all supporting information can be included with the event, and makes it easy for administrators to access it when needed.

8 Location- and facility - specific tags

The system should include a searchable location feature that makes it easy for reporters to associate events with specific facilities and locations. This streamlines reporting and enhances accuracy.

“ My mantra throughout this process has been that it only takes 30 to 60 seconds to enter a risk event — it all depends on how fast you type.

— Kerrie Griffin
Director of Ambulatory Quality Management,
CHRISTUS Health



Event Communication

Strong safety event communication ensures gaps are identified and addressed as quickly as possible — and that no information slips through the cracks.

1 Automated event routing

The system should automatically assign safety events to pre-defined investigators based on location, event type, and severity, as well as issue automated email notifications. This streamlines workflows and supports timely investigations.

2 Automated email confirmation

The system should send automated email confirmations to users who complete reports so they know the event is being handled and investigated.

3 Automated event escalation

The system should automatically escalate events based on customized alert thresholds and protocols to ensure your investigation guidelines are consistently followed. Automated event escalation should also inform safety investigators when the time frame for investigating a case has expired or is nearing expiration. Escalations should also be sent to reporters and managers when cases are saved but not submitted or when serious event classifications are entered.

4 Communication templates

The system should provide predefined email templates for notifying relevant team members about events. This streamlines and automates workflows.

5 Automated delivery of scheduled reports

The system should have the capability of automating scheduled report delivery for authorized users, creating efficiencies and saving time.

“ It’s been said that if you can’t measure it, you can’t manage it. [...] I think without knowing how much harm you have that’s caused by the various types of events, you can’t effectively do a good job in addressing the things that are most important at your institution.

— Dr. David Westfall Bates
Medical Director of Clinical and Quality Analysis, Mass General Brigham; Chief of General Internal Medicine, Brigham and Women’s Hospital



Event Analysis and Investigation

In order to foster continuous safety improvements, the system should make it easy to analyze and investigate safety event data.

1 Analysis tools

The system should use event analysis tools to convert health data into intelligence that provides greater visibility into trends and gaps – helping leaders prioritize safety and quality initiatives and drive change. Tools should include timelines, cause mapping, solution maps, fishbone diagrams, the five whys, and gaps analysis. Additional review features should include options to create sentinel event reports, root cause analysis, and Joint Commission reporting forms.

2 Action plans and results

The system should enable users to define event action plans and assign tasks to others, as well as the ability to measure the effectiveness of the action.

3 Report tracking

The system should enable certain users to review reported events, including current status and any details surrounding action plans.

4 Personalized dashboards

The system should enable certain users to create personalized dashboards based on their needs (i.e., the data and charts most meaningful to them), and provide comprehensive graphical executive dashboards with presentation-ready visualizations. This makes it easy to share information with relevant individuals, departments, and leadership.

5 Enterprise-level reports

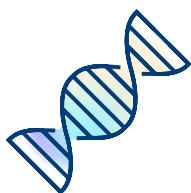
The system should enable users to create and export tables, pivots, and charts to analyze data across the organization and at the location level.

6 Search features

The system should enable quick searches for relevant information, including by name, MRN, Patient ID, event type, dates, keywords, locations, and open incidents. This improves efficiency for investigators and administrators.

7 Automated record documentation

The system should automatically document activity associated with event records (including information related to event views, record opens, patient searches, and record changes). This ensures a proper chain of custody, including providing insight into when and why changes are made.



Scalability and Collaboration

The most effective safety event systems work with healthcare facilities as an extension of their clinical teams — adapting to meet expanding needs, delivering on new initiatives, and helping instill a culture of continuous improvement.

1 Expansive capabilities

The system should be designed to scale and adapt to evolving needs. For example, a system integrated into a larger platform of solutions provided by the same vendor — such as those that reduce organizational risk, manage compliance concerns and legal claims, improve patient relations and service recovery, and streamline audit processes — provides workflow and cost advantages to healthcare facilities.

2 Proven expertise

The vendor partner should provide references, case studies, and proof points that attest to their ability to support safety and quality objectives, such as those related to antimicrobial stewardship, sepsis, and medication errors. Industry recognition from organizations such as KLAS also help differentiate reputable and experienced vendors from the rest.

3 Comprehensive protection

The patient safety solution should integrate seamlessly with the EHR and work together with clinical surveillance software to protect both clinicians and patients. This integrated approach ensures organizations are well-informed about a wide range of events through data tracking, trend analysis, and insights into close calls or serious harm incidents — all without solely relying on frontline staff for reporting.

4 Collaboration

The vendor should explore new ideas and embark on new projects with their customers, and a wide range of references should attest to this attribute. The most effective vendors are nimble and dedicated to continually improving features and functionality, expanding the value they deliver.

“ Investing in synergistic technology in conjunction with EHRs to help clinicians prioritize their workflow by providing the right information to them at the right time prevents harm, improves safety, and is simply a good return on investment.

— Dr. Hayley Burgess
SVP, Provider Surveillance and Safety,
Inovalon

Get Ahead of Harm with Inovalon

VigiLanz Safety Management, part of Inovalon's suite of award-winning clinical surveillance tools ranked #1 by KLAS Research, is an innovative cloud software application that supports patient safety initiatives. The software provides a modern, configurable platform for identifying, reporting, managing, and communicating patient safety events.

By incorporating all of the features and functions listed in this guide, VigiLanz Safety Management enables inpatient and outpatient organizations to rapidly identify and analyze safety incidents, minimize time spent capturing and managing them, and promote a culture of safety while reducing adverse events.

Contact us to learn how partnering with Inovalon can help your institution get ahead of harm and make a difference in patient care.

Connect with our clinical experts today at [inovalon.com](https://www.inovalon.com).





About Us

Inovalon is a leading provider of cloud-based SaaS solutions empowering data-driven healthcare. The Inovalon ONE® Platform brings together national-scale connectivity, real-time primary source data access, and advanced analytics into a sophisticated cloud-based platform empowering improved outcomes and economics across the healthcare ecosystem. The company's analytics and capabilities are used by nearly 20,000 customers supporting more than 53,000 sites of care. For more information, visit www.inovalon.com.

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