

Checklists for Users of VitalData

DOCUMENT CONTROL	
Version	1.2
Date	26/3/2023
Prepared by	Ailish Nimmo, Hannah Preston, Oliver Thomas

CONTENTS

1. Purpose	2
2. Guide to VitalData Sections Referred to in Checklists	3
3. Checklists	
• When seeing a new patient in renal clinic	4
• When seeing a return patient in renal clinic	5
• When seeing a patient in transplant clinic	6
• When discharging a renal patient	7
• When discharging a transplant patient	8
• When seeing a patient in ambulatory care	9
• When giving ad hoc advice about a patient	10
• At the end of a ward week	11
• When a patient dies	12
4. QI and Audit Ideas	13

PURPOSE

“Rubbish in, rubbish out”

Dr Wendy Metcalfe

“Gosh, I had no idea I was meant to be doing that”

Dr Oliver P Thomas

VitalData is a tool for delivering high quality continuing care for renal patients. An enormous amount of data can be captured within VitalData, but inputting and maintaining these data is essential to maximising the utility of the system.

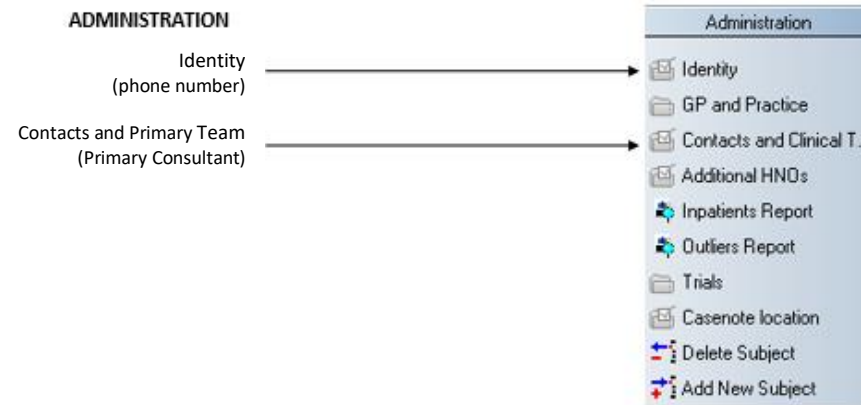
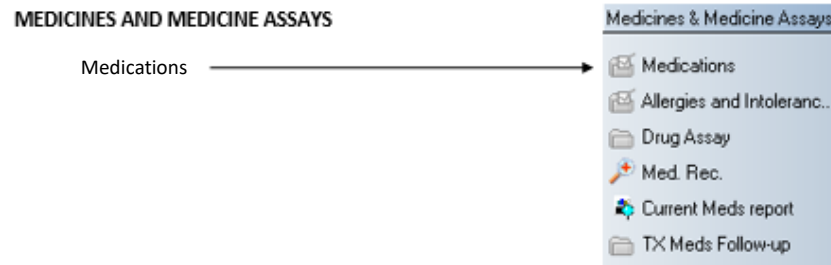
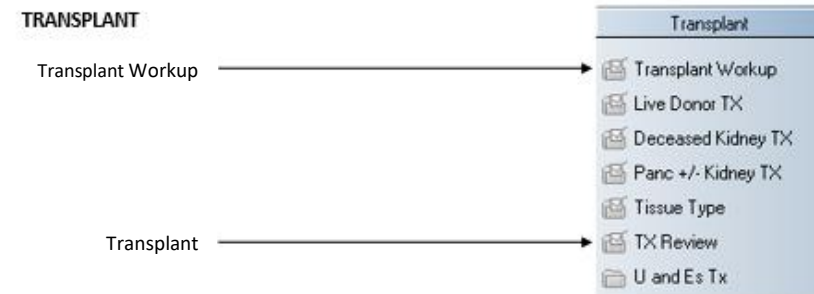
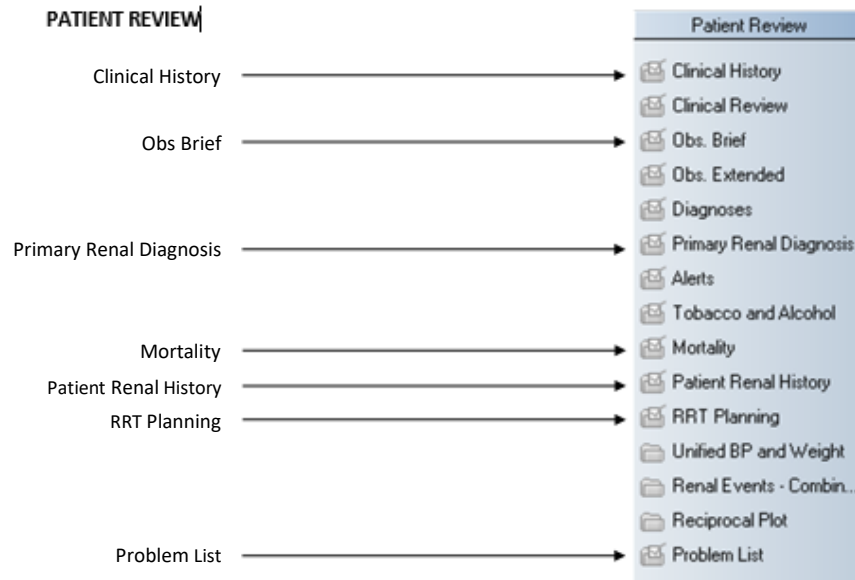
Anecdotal evidence suggests time pressures and clinical workload are barriers to timely and comprehensive updating of VitalData after patient encounters.

The following checklists are proposed as aide memoirs for busy clinicians. They can reduce the cognitive burden associated with remembering which data to record and update in which settings.

The checklists are not presented as comprehensive, nor as mandatory. Not all patients in each circumstance will need each data point recorded. They will, however, provide a handy reminder of things to consider.

Ideas for QI and audit projects are suggested. These are intended as a way to ensure the data being recorded are fit for purpose and clinically useful, rather than as a way of promoting compliance for compliance sake.

VitalData sections referred to in these checklists



CHECKLIST 1 – When seeing a new patient in renal clinic

	✓
Primary Renal Diagnosis* (if known)	<input type="checkbox"/>
Problem List	<input type="checkbox"/>
Medications	<input type="checkbox"/>
Obs Brief	<input type="checkbox"/>
Urinalysis	<input type="checkbox"/>
RRT Planning	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

* As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

CHECKLIST 2 - When seeing a return patient in renal clinic

Primary Renal Diagnosis*	<input type="checkbox"/>
Patient Renal History	<input type="checkbox"/>
Problem List	<input type="checkbox"/>
Medications	<input type="checkbox"/>
Obs Brief	<input type="checkbox"/>
Urinalysis	<input type="checkbox"/>
RRT Planning ⁺	<input type="checkbox"/>
Transplant Work-up	<input type="checkbox"/>
Phone Number	<input type="checkbox"/>

* As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

⁺ Including chosen modality, CDT referral, VAN referral, transplant status, social work status, Hepatitis B status

CHECKLIST 3 - When seeing a patient in transplant clinic


Primary Renal Diagnosis*	<input type="checkbox"/>
Patient Renal History	<input type="checkbox"/>
Problem List	<input type="checkbox"/>
Medications	<input type="checkbox"/>
Obs Brief	<input type="checkbox"/>
Urinalysis	<input type="checkbox"/>
Transplant Review events ⁺	<input type="checkbox"/>
Transplant Review note [#]	<input type="checkbox"/>
Phone Number	<input type="checkbox"/>

* As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

⁺ Including stent removal, rejection episode, other complication

[#] If letter not likely to be available before next clinic review

CHECKLIST 4 - When discharging a renal patient

	
Discharge Letter	<input type="checkbox"/>
Medications	<input type="checkbox"/>
Primary Renal Diagnosis* (if known)	<input type="checkbox"/>
Patient Renal History ⁺	<input type="checkbox"/>
Problem List	<input type="checkbox"/>
Primary Consultant	<input type="checkbox"/>
HD Prescription	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

* As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

⁺ Including acute RRT during admission

CHECKLIST 5 - When discharging a transplant patient

	✓
Discharge Letter	<input type="checkbox"/>
Medications	<input type="checkbox"/>
Primary Renal Diagnosis* (if known)	<input type="checkbox"/>
Patient Renal History ⁺	<input type="checkbox"/>
Problem List	<input type="checkbox"/>
Primary Consultant	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

* As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

⁺ Including date and type of transplant

CHECKLIST 6 - When seeing a patient in ambulatory care

	<input type="checkbox"/>
Clinical History/Transplant Review note	<input type="checkbox"/>
Obs Brief	<input type="checkbox"/>
Urinalysis	<input type="checkbox"/>
Medications	<input type="checkbox"/>
Problem List	<input type="checkbox"/>
Primary Renal Diagnosis* (if known)	<input type="checkbox"/>
Primary Consultant	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

* As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

CHECKLIST 7 - When giving ad hoc advice about a patient

✓

Add patient to VitalData*	<input type="checkbox"/>
Clinical History note ⁺	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

* If not already known to service
⁺ Including any relevant email correspondence

CHECKLIST 8 – At the end of a ward week

Update Ward List entry	<input type="checkbox"/>
Update HD Prescription	<input type="checkbox"/>
Patient Renal History*	<input type="checkbox"/>
Update Primary Renal Diagnosis+ (if known)	<input type="checkbox"/>
Add temporary patients to VitalData	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

* Including acute RRT, change of modality, withdrawal from RRT

+ As per ERA coding: https://www.srr.scot.nhs.uk/projects/ERA-EDTA_Codes.pdf

CHECKLIST 9 – When a patient dies

Discharge Letter	<input type="checkbox"/>
Patient Renal History	<input type="checkbox"/>
Mortality Details*	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

✓

* Not available until date of death imported from SCI Store.
EDTA code (main cause) to be completed as a minimum

QI AND AUDIT IDEAS

The following areas have been identified by consensus as frequently missed or infrequently updated. They may be suitable subjects for quality improvement work.

- Recording of acute RRT for AKI
- Primary renal diagnosis
- Problem list
- Change of RRT modality
- Tunnelled line insertion on HD prescription