**Issue/Process: Patient Factors**

**Status:** Approved  
**Action Requested:**

**Reviewing Group:** CPOE Steering Committee

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**Issue/Background: Patient Factors**

Patient Factors are data elements that identify important patient characteristics (weight, allergies, etc). These factors can impact the treatment options for a patient. If these factors are not made available to treating clinicians, decisions could be made that can potentially cause negative or untoward outcomes.

While an organization can delineate which Patient Factors are to be collected for the patient’s medical record, there are three key factors that are recognized as being required for safe order practice: Allergies, Weight, and Pregnancy Status. These factors independently or collectively can impact decisions about types of medications, dosing of medications or diagnostic testing. If the factors cannot be obtained or determined, it should be documented as such. For medications requiring weight-based dosing, if an actual weight is not obtainable, an estimate should be used based on the clinician’s assessment of the patient.

Historically, Patient Factors have been collected and documented with or without an electronic medical record. At Virtua, Patient Factors were first electronically entered into Net Access. Most recently, this information is now entered into Soarian Orders Module. Virtua design decisions made the three factors above mandatory for completion along with Height. These four factors are defaulted as “required” and if not completed in Soarian, orders cannot be entered. Currently, there is no seamless process for entering the four factors quickly to allow for immediate and rapid entry of orders.

**Recommendations**

- Require only Allergies and Weight for Order Entry
- Process should allow for entering of both Allergies and Weights from one single screen
  - Use Patient Factors Screen as single point of documentation
  - Move Weight field to top section of the Patient Factor Screen
  - Add drop down to weights for how obtained or if unobtainable
  - If weight is unobtainable and cannot be estimated, enter “000” in weight field
  - Enter allergies from Patient Factors Screen and indicate if unobtainable
- When Allergies and Weight have been entered in top portion of the Patient Factors Screen, change status of form to “In Process”
  - This sends reminder to Clinical Documentation Worklist to complete the form for remaining factors
- Review current process flows at points of entry for patients and determine/revise flows to promote quick entering of Patient Factors by staff
- Investigate Quality Reporting to monitor frequency of use of “estimated data”

**Source of Recommendations**

- Work groups
- CPOE team
- CPOE Operations Committee

**Response/Comments:**

(Please reply “Approve”/“Reject”/“Schedule Conference Call”/“Red Flag” using voting buttons)