

Optimizing and Standardizing the Pre-Op Checklist:



Why Less is More

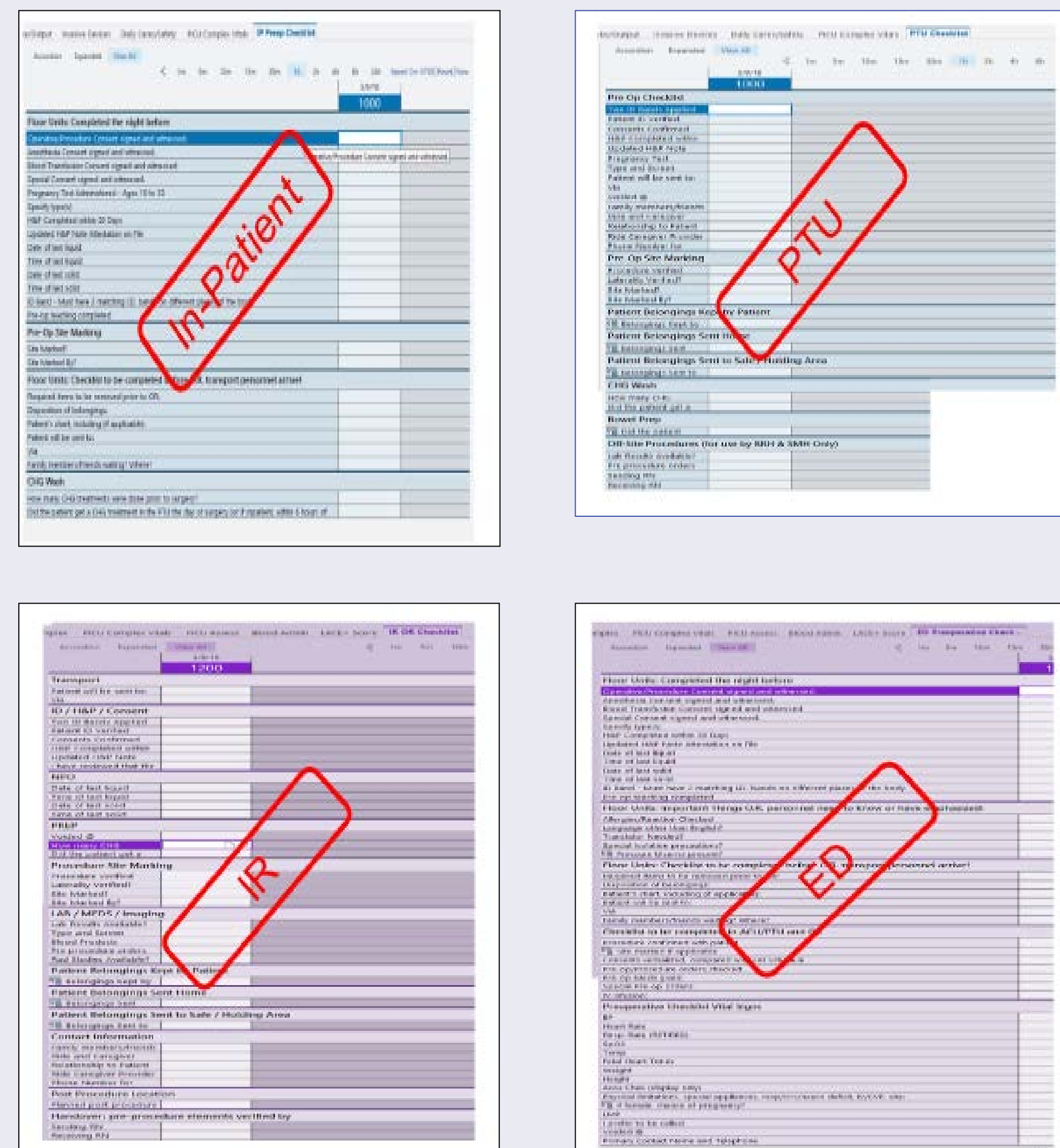
Devie Charbonneau BSN, RN, CPAN, CAPA
UCLA Health



Background

There are multiple pre-operative checklists in the electronic health record (EHR) at our institution used by the Emergency department (ED), Interventional radiology (IR), inpatient (IP) nursing and the Perioperative department (PTU)

Some fields in each checklist are not shared so information is not visible to the departments that utilize each checklist. Nurses have to search all over the EHR for the information they need to ensure that their patient is ready for their procedure or surgery. Merging the multiple checklists into one standardized checklist was done by a bedside nurse as a Nursing Informatics Fellowship project.



Purpose

Optimize and standardize the pre-operative checklist that existed at our institution's electronic health record to ensure that all standards of care for our perioperative patients are met when they are sent for their procedure or surgery.

Methods

Nursing Informaticist (NI) involved in development and implementation

A task force consisting of perioperative clinical nurses as well as representatives from the leadership team validated the contents of the new standardized checklist. It took two meetings to review each field to ensure that all the elements on the checklist met the perioperative standards of care.

- Each checklist that existed in the EHR was presented to the group
- Each row in each checklist was reviewed and validated by the task force
- Real time changes made to create the standardized checklist
- Final checklist was presented to the leadership team of each department for approval

Excel Spreadsheet – used to create the standardized checklist by tracking real time changes based on the task force's recommendations

FLI ID	Flowsheet Section Name	Row ID Record	Display Name	ChoiceList	Single or Multi Select or Other	Row Information	General Notes	Perioperative Workgroup Notes/Recomm	Notes for phase 2
17006	Pre-Op Checklist	17025	Patient ID Verified	Verbal, Armband, Patient unable to verbalize, Ped - Parent ID, Emergency ID band	Multiple	None	General Guidance: Should this row exist? Is the order correct?	yes	
337	Floor Units: Completed the night before	3040001251	ID Band - Must have 2 matching I.D. bands on different places of the body.	Yes, No	Single	Please do not apply arm bands on the operative site.	Update I.D. to ID	yes	Is this in policy/guidelines?
337	Floor Units:	3040001241	Date of last liquid	Date Field	Other		In the pre-op navigator, but	yes	
337	Floor Units:	1217	Time of last liquid	Time Entry	Other		In the pre-op navigator, but	yes	
337	Floor Units:	1020100005	Date of last solid	Date Field	Other		In the pre-op navigator, but	yes	
337	Floor Units:	1630100000	Time of last solid	Time Entry	Other		In the pre-op navigator, but	yes	
17006	Pre Op Checklist	17026	Consents Confirmed	Surgical, Anesthesia, Blood products, Sterilization, Hysterectomy, Electroconvulsive therapy, (Other)	Multiple			yes	group preferred single row for staff
17006	Pre Op Checklist	17016	Procedure Verified	Yes, No	Single			yes	
17006	Pre Op Checklist	1070500002	Laterality Verified?	Yes, No, N/A	Single			yes	
17006	Pre Op Checklist	1071126	Site Marked?	Yes, No, N/A	Single			yes	
17006	Pre Op Checklist	1070500003	Site Marked By?		Free text			yes	
17006	Pre-Op Checklist	3040001247	H&P Completed within 30 Days	Yes, No, N/A	Single		MS 200, let's take a look at policy...	yes	
17006	Pre-Op Checklist	10707000010	Updated H&P Note Attestation on File	Yes, No, N/A	Single		MS 200, let's take a look at policy...	yes	
337	Floor Units: Completed the night	21042	Pregnancy Test Administered - Ages 10 to 53	Yes, No (Waiver signed), No (comment), N/A	Single	Ages 10 - 53 Pre-Procedure Pregnancy Testing (HS 1341)	Should we add a time frame to the question for	yes	
17006	Pre-Op Checklist	1070500200	Type and Screen	Yes, No, N/A	Single	Transfusion Policy HS 1338		yes	
17006	Pre-Op Checklist	3040001293	Voided @		Time entry	Indicate if its Foley in the		yes	
17006	Pre-Op Checklist	3040001294	Family members/Friends waiting?	Yes, No	Single		Update row to be "Yes"	yes	
	new row to be created		Where?	Surgical waiting area, Clark urology, Patient room	Single		Add additional choicelist options: Off-site, Other (Comment)	Create new row Add additional option: Other	Add "Offsite" Add "Other (Comment)"

Results / Outcomes

- Creation of the standardized checklist known as the "golden checklist"
- Golden checklist used by all departments who send patients for surgery or procedure
- Some fields are hidden from other departments who do not need the information
- Data that needs to be shared populates across the fields
- Entire nursing staff trained to use the checklist
- Reduced the of number of pre-op checklists from 4 to 1
- Nurses able to easily find the information needed to prepare the patient for surgery / procedure
- Eliminated unnecessary content and decreased the amount of time needed to complete the checklist

Pre-op Checklist	
Two ID Bands Applied	
Patient ID Verified	
Consents Confirmed	
H&P Completed within Updated H&P Note	
Type and Screen Verified	
Patient will be sent to:	
Via	
Voided @	
Family members/friends	
Ride and Caregiver	
Relationship to Patient	
Ride Caregiver Provider	
Phone Number for	
Pre-Op Site Marking	
Procedure Verified	
Laterality Verified?	
Site Marked?	
Site Marked By?	
Patient Belongings Kept by / Sent to OR	
Belongings Kept by	Jewelry (Com...
Jewelry (describe):	Giant gold ring ...
Patient Belongings Sent Home	
Belongings Sent	Hazardous
Hazardous	Weapons
Hazardous (describe):	volatile chemic...
Belongings sent home	some dude na...
Patient Belongings Sent to Safe / Holding Area	
Belongings Sent to	Valuables
Valuables	Cash (Comment)
Comment:	A couple garb...