

Safe Surgery 2015: South Carolina

Teamwork Observation Tool & Surgical Safety Checklist Observation Tool



Implementation Leader Instructions

Thank you for participating in *Safe Surgery 2015: South Carolina*. Assessing teamwork and monitoring adherence to the Surgical Safety Checklist in your operating rooms is an extremely important part of this project. The “Teamwork Observation Tool” and “Surgical Safety Checklist Observation Tool” collect information regarding teamwork and processes performed in the operating room in order to improve surgical outcomes.

Please email safesurgery2015@hsph.harvard.edu if you have any concerns regarding the use of the observation tools. You can also bring your questions to the Friday “Office Hours” calls. We would be happy to respond directly and immediately in either forum.

Observation Tools:

Two tools have been designed to be used together in a given surgical case. ***We recommend that these tools be used in a minimum of five cases per quarter.*** Many hospitals have chosen to perform more observations, and we welcome you to do this as well if you so choose.

Teamwork Observation Tool:

Completed By: Senior nurse manager, quality improvement, and/or patient safety officer.

Time to Complete the Tool Including Observation Period: At least one hour or the duration of the surgical case if it is less than one hour.

Surgical Safety Checklist Observation Tool:

Completed By: Circulating Nurse for the case. The circulating nurse should have a minimum of 3 years of experience.

Time to Complete the Tool: 5 minutes, either during the procedure or immediately there after.

On the next page we provide instructions for the use of these tools and steps that we recommend that you take as implementation leaders.

Recommended Steps:

1. Every member of the checklist implementation team should complete the web-based training for the [Teamwork Observation Tool](http://safesurgery.teamtraining.sgizmo.com/s3) (<http://safesurgery.teamtraining.sgizmo.com/s3>) and review the document "[Surgical Teamwork Observation Instructions](#)". It is important for every member of the implementation team to complete this step so they can help their colleagues who will eventually be using these tools in the operating room.
2. Select an observation coordinator to lead the observation efforts at your hospital. This person could be someone from the checklist implementation team or a nurse manager/quality improvement officer. If this individual is not part of the checklist implementation team they will need to complete the [web-based training](#) for the [Teamwork Observation Tool](#) and review the "[Surgical Teamwork Observation Instructions](#)".
3. Identify one or more individuals to conduct the teamwork observations. These individuals can be surgical nurse managers, quality improvement / patient safety officers or other staff members with appropriate clinical experience. These individuals should be known to OR personnel and trusted by members of the surgical team. Observers will also need to complete the web-based training course for the [Teamwork Observation Tool](#) and review the "[Surgical Teamwork Observation Instructions](#)".
4. Implementation leaders, observation coordinator, and teamwork observers should review the "[Surgical Safety Checklist Observation Instructions](#)" and observe one case using the [Surgical Safety Checklist Observation Tool](#). The reason for doing this is to gain familiarity with the tool in order to help circulating nurses use it.
5. Identify circulators to perform the [Surgical Safety Checklist Observation Tool](#). Circulating nurses should have a minimum of three years of experience. Participating circulating nurses should review the "[Surgical Safety Checklist Observation Instructions](#)" prior to using the tool in a surgical case.
6. Identify cases in which to use the observation tools:
 - a. These tools should be used in cases that are expected to last longer than 30 minutes.
 - b. Observe the second case of the day for five consecutive days. Make sure that you observe in various operating rooms throughout the week to capture the teamwork and checklist use of different surgical teams.
 - c. ***We recommend that the observation coordinator discuss the upcoming observation with the surgeon prior to when they will be observed.***
7. Use the observation tools in at least *five* cases per quarter. Both the Teamwork Observation and the Surgical Safety Checklist Observation tools should be simultaneously used in the same cases.
8. The teamwork observer should introduce him/herself to surgical team at the beginning of the case. S/he should explain that they (teamwork observer and circulating nurse) will be completing short tools during the surgical procedure assessing teamwork and checklist use. Emphasize that these tools are for quality improvement and are not for evaluation purposes. The teamwork observer should encourage surgical team members to ask questions about the project and the results of their observations.
9. Following the case the observation forms should be returned to the observation coordinator. If you are using these tools for self-monitoring purposes only we recommend that you compile the results into a report and provide feedback to surgical teams.
10. If you have opted to participate in the research (Option 2) we recommend that local copies of all of the observation tools should be kept on site.
11. When the observations for the quarter are complete, please email or mail completed observation tools to:

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