Preference Card Oversight - A Team Approach
Baltimore Washington Medical Center

Program/Project Description.
Team STEPPS concepts were introduced to the Operating Room staff, surgeons, and anesthesiologists beginning in May of 2008. The training sessions introduced crew resource and safety concepts, proven in airline, nuclear, and other High Reliability industries. One of the exercises in the training, "magic wand", identified a huge source of dissatisfaction among the surgeons and nursing staff. The issue was incorrect surgical case preference cards, which was recognized as a patient safety focus for our staff. The preference cards are used to prepare the supplies for each surgical procedure. We recognized the incorrect supplies could delay the procedure, or worse cancel the procedure for each patient. Because the cards were not updated and current, supplies that were not needed for cases were prepared, only to be discarded after the fact, causing a potential for waste. Other supplies that were needed were not made available. The surgeons were dissatisfied with the incorrect supplies and waiting for the correct equipment to be retrieved. The process issue was inconsistency in reviewing and updating the preference cards. We identified the need for a process redesign to review and update our preference cards on a routine basis. At that time, one individual in the OR was assigned the function of preference card review and maintenance along with multiple other duties and responsibilities. This resulted in the preference cards not being reviewed and updated in a timely manner. The goals of this project were to increase staff and surgeon satisfaction through use of correct preference card for each surgical procedure and to reduce waste of supplies. Success would be measured through improved staff and surgeon satisfaction - obtained through surveys, and measured the decrease in supply waste.

Process.
The Perioperative Director and Manager recognized the need for this process improvement through review of the TeamSTEPPS program data. It was determined that our Service Line Coordinators (SLCs) would be trained and subsequently be responsible for updating their preference cards. SLCs are certified registered nurses with clinical expertise in a specific surgical specialty. The Perioperative leaders facilitated the training of the SLCs in how to change the preference cards correctly. Once the training was complete, the responsibility for preference card review and updating was assumed by the SLCs. One hundred percent of the preference cards were collected, reviewed, and updated over a 4-month period.

Solution.
The responsibility for reviewing and updating the preference cards was decentralized to appropriate staff experts, the Service Line Coordinators. The OR staff was informed of the process change via posters and inservice sessions. The SLCs were allowed the necessary time away from patient care duties as well as the required computer access to ensure success of the project.

Measurable Outcomes.
Implementing a decentralized approach to the oversight of preference card review and maintenance has resulted in improved staff and surgeon satisfaction, as well as a decrease in the wasting of supplies.

Sustainability.
SLCs are allocated time on a regular basis away from their patient care duties for preference card review and revision. There is a designated location in the department for any cards that currently need changes.

Role of Collaboration and Leadership.
The entire OR staff and surgeons were actively involved by annotating necessary changes on the cards. The expectation for all cards to be returned for review was consistently communicated and reinforced. This included weekend staff and on-call cases. The Perioperative Director and Manager were engaged in the project at the onset to ensure success. Again, they provided for adequate staff training and allowed the expert staff the necessary time away from patient care duties to complete this initial project. The SLCs were very aware of their leadership support throughout the original clean up of the cards.

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