

NK6

Provide one example, with supporting evidence, of how clinical nurse(s) implemented a professional organization's specialty standards or guidelines in the organization.

Example: Implementation of ASPAN Standard – Standardized Pre-Op Handoff Tool

Professional Organization Standards or Guidelines

The American Society of PeriAnesthesia Nurses (ASPAN) Nursing Standards, Practice Recommendations and Interpretive Statements recommend safe transfers of care for handoffs and transportation of patients. Effective handoffs should have a consistent, predictable, and tailored structure. ([Evidence NK6-1, ASPAN Standards 2023-2024](#))

Clinical Nurses' Implementation of Standards or Guidelines

Susan Worley, BSN, RN, HACP, Clinical Nurse Coordinator, Pre-op Raleigh, and Allison Manning Williams, BSN, RN, CEN, Clinical Nurse IV, Pre-op Raleigh, identified a problem with the handoff of patient care from the Emergency Department and inpatient units to Pre-op. They shared their concerns with Sonja Lee, BSN, RN, CAPA, Nurse Manager, Pre/Post Surgical Services, at the April 2023 staff meeting. ([Evidence NK6-2, Staff Meeting Minutes April 2023](#)) Handoffs were inconsistent, changing based on who obtained report, and Pre-op nurses had concerns about patient safety due to inconsistency in the information that was communicated. Safety concerns included patient NPO status, abnormal lab values, clarification of consents, change in patient status, and a familial history of malignant hyperthermia (severe reaction to anesthetic drugs), which could be fatal.

In March 2023, Lee requested a Kaizen Breakout Session to examine Worley and Williams' request to standardize a tool for safe patient handoff. In May 2023, Lora Wright, MT(ASCP), CPHQ, PCMH CCE, Kaizen Sensei, made direct observations and collected data on the current process in the Pre/Post Surgical Units at Raleigh, Cary, and North campuses; these confirmed the inconsistent practice.

The one-day Kaizen Breakout Session was held on June 28, 2023, with 18 staff members participating. During the morning session, participants reviewed the data collected by Wright from May 15-June 21, 2023. They discussed the data results and compared their thoughts about the information that should be covered during pre-op handoffs. During the session, unit clinical nurses expressed their understanding of why Pre-op clinical nurses were asking for information such as intravenous access status and NPO status. ([Evidence NK6-3, Kaizen Event Worksheet](#))

The purpose of the event was to use ASPAN standards to develop a standardized handoff tool that uses available technology to reduce nurse workload while improving communication and patient safety.

Participants



Kaizen Breakout Session, June 28, 2023

Name/Credentials	Discipline	Title/Role	Department
Susan Worley, BSN, RN, HACP	Nursing	Clinical Nurse Coordinator	Pre-op Raleigh, Surgical Services
Allison Manning Williams, BSN, RN, CEN	Nursing	Clinical Nurse IV	Pre-op Raleigh, Surgical Services
Sonja Lee, BSN, RN, CAPA	Nursing	Nurse Manager	Pre/Post Surgical Services
Cassandra Moore, BSN, RN, HACP	Nursing	Clinical Educator/ Supervisor	Pre-Op Raleigh
Smitha George, BSN, RN, HACP	Nursing	Education Resource Specialist	Pre-Op Raleigh
Jessica Pulley, RN	Nursing	Clinical Nurse IV	Pre-Op North
Crystal Malloy, BSN, RN, HACP	Nursing	Clinical Supervisor/ Educator	Pre-Op Cary
Katlyn Scalf, RN	Nursing	Clinical Nurse I	Adult Emergency Department Raleigh
Kelly Guzouskis, RN	Nursing	Clinical Nurse III	Children's Emergency Department Raleigh
Jennifer Reed, RN	Nursing	Clinical Nurse I	Emergency Department Cary
Amy Simmons, BSN, RN, CV-BC	Nursing	Clinical Nurse IV	3A Raleigh
Barbara Corcoran, BSN, RN, RN-BC	Nursing	Clinical Nurse IV	Pediatric Intensive Care Unit Raleigh
Jen Gauvain, BSN, RN, RN-BC	Nursing	Clinical Nurse IV	6B Orthopedics Raleigh
Nicole Creech, RN	Nursing	Clinical Nurse IV	6C Raleigh
Consuelo "Joy" Palomillo, BSN, RN, RN-BC	Nursing	Clinical Nurse IV	Surgery & Trauma Cary
Barbara Johnston, BSN, RN, RN-MED/SURG	Nursing	Clinical Nurse IV	Med/Surg North
Barbi Cox, BSN, RN, CNOR	Nursing	Systems Analyst II	Information Services
Jenni Wheeler, BSN, RN, CEN	Nursing	Systems Analyst II	Information Services
Sharon Reif, MSN, RN, CEN	Nursing	Systems Analyst III	Information Services
Jason Wilson, BSN, RN, CEN	Nursing	Clinical Informatics Specialist II	Information Services
Waqiah Ellis, PhD, RN, NE-BC, BCC	Nursing	Vice President, Nursing	Raleigh

Lora Wright, MT(ASCP), CPHQ, PCMH CCE	Kaizen Promotion Office	Kaizen Sensei	Kaizen Promotion Office
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In August 2023, a pre-implementation nurse survey about the proposed tool was sent to the nursing units that had members who participated in the June 28, 2023 Kaizen event. On the survey, 77% of nurses agreed that a standardized, structured pre-op handoff tool would benefit patient safety.

In September 2023, Barbi Cox, BSN, RN, CNOR, System Analyst II, Information Services, Sharon Reif, MSN, RN, CEN, System Analyst II, Information Services, Jenni Wheeler, BSN, RN, CEN, System Analyst II, Information Services, and Jason Wilson, BSN, RN, CEN, Clinical Informatics Specialist II created an electronic Pre-op Handoff Tool in Epic based on the ASPAN standards/practice recommendations and on the template created by Worley, Williams, Cassandra Moore, BSN, RN, HACP, Clinical Educator/Supervisor, Pre-op Raleigh, Smitha George, BSN, RN, HACP, Education Resource Specialist, Pre-op Raleigh, Jessica Pulley, RN, Clinical Nurse IV, Pre-op North, Katlyn Scalf, RN, Clinical Nurse I, Adult Emergency Department Raleigh, Kelly Guzouskis, RN, Clinical Nurse III, Children's Emergency Department Raleigh, Amy Simmons, BSN, RN, CV-BC, Clinical Nurse IV, 3A Raleigh, Barbara Corcoran, BSN, RN, RN-BC, Clinical Nurse IV, Pediatric Intensive Care Raleigh, Jen Gauvain, BSN, RN, RN-BC, Clinical Nurse IV, 6B Orthopedics Raleigh, Consuelo "Joy" Palomillo, BSN, RN, RN-BC, Clinical Nurse IV, Surgery & Trauma Cary, and Barbara Johnston, BSN, RN, RN-MED/SURG, Clinical Nurse IV, Med/Surg North. George created PowerPoint education on the Pre-op Handoff tool for clinical nurses. The Pre-op Handoff tool aligns with ASPAN recommendations by being designed to incorporate patient history and assessment findings in the health record. The Pre-op tool pulls data from vital signs, the medication administration record, and test results. It is used to align the real-time communication between the two clinical nurses involved in handoff over the telephone. ([Evidence NK6-4](#), [Educational PowerPoint](#), [slide 22](#))

In December 2023, Cox, Wilson, Moore, and George tested the Pre-op Handoff Tool in the Epic Playground to ensure functionality.

Waqiah Ellis, PhD, RN, NE-BC, BCC, Vice President, Nursing, Raleigh requested that the tool be presented to the Nursing Practice and Quality Council and Adult Emergency Department nurse leaders for feedback and approval. In March 2024, Lee presented the process and tool to the Nursing Practice and Quality Council, and the educational PowerPoint was updated to include steps for EDs and inpatient units use. The council approved the handoff tool.

In March 2024, the education was presented via email to Pre-op nurses across the system and to Surgical Trauma leadership. 6B and the Children's ED trialed the Pre-op Handoff Tool and provided feedback including the following: not all staff members were aware of the tool, Epic functionality noted that some information had auto populated, Pre-op nurses continued to use the paper form because they did not have the arrow to

open the sidebar to see the comprehensive patient information, and report when using the form was as short as two minutes.

Information Systems team members were notified of the requested changes and edits. Wilson and Cox were responsible for changes and updates to the Epic Pre-op Handoff Tool. One suggested change was to require Pre-op nurses to respond “No” to the question, “Create Log” because the patient would not be in Pre-op when nurses get report. Cox and Wilson addressed the concern and created a solution. Another issue was that Pre-op nurses were not able to see data that was already filled in prior to getting report from the ED or inpatient nurses. Cox and Wilson’s solution was for the Pre-op nurse to click inside the “Last Filled” column to see information such as lab results. An issue raised by 6B and Children’s ED nurses was that they were unable to see the other nurse’s name when filling in the “I verified I gave report to” and “I received report from” sections of the report. Cox and Wilson’s solution was for nurses to hit the “refresh” button to be able to see the other nurse’s name, thus saving nurses a documentation step.

Tip sheets were created by Renee Pendergrass, RN, Instructional Designer I, Clinical Informatics & Training; Katy Southerland, BSN, RN, Clinical Informatics Specialist II, Clinical Informatics; and Laurece Spellman, Instructional Designer I, Clinical Informatics & Training. Lee presented the updated process and the WakeMed U learning module, and distributed tip sheets for the Pre-op Handoff Tool and revised process, at the March 2024 Supervisor/Educator meeting.

In April 2024, Lee presented the process and tool to the Nursing Executive Committee (NEC) for final review and received unanimous approval. ([Evidence NK6-5, NEC April 2024 Meeting Minutes](#)) The standardized Pre-op Handoff Tool, based on ASPAN standards, went live across WakeMed Health & Hospitals in June 2024.