Operating Room Briefing and Debriefing Audit Tool

# Introduction

## Problem Statement

One of the strongest determinants of safety culture is whether local and hospital leadership respond to staff patient safety concerns. Frontline providers understand patient safety risks in their clinical areas and have great insight into potential solutions to these problems. Your team needs to seek frontline providers’ knowledge and use it to guide your safety improvement efforts.

## Purpose of This Tool

The Operating Room Briefing and Debriefing Audit Tool will help your team quantify the consistency of your briefing and debriefing sessions. By tracking the evidence-based best practices in team communications, your team can improve communication clarity and effectiveness, as well as raise expectations for your communication practices.

## Please Adapt This Tool

A team of clinicians designed this tool to assess practice variability in its perioperative area. Your team may want to add questions that are not included in this tool, and this tool may include questions your team does not need. Please modify this tool to best fit your team’s needs.

## How To Use This Tool

Assign a safety team member to observe a specific number of briefing or debriefing sessions. You will need to define what to observe: every briefing session during a specific time period, a specific procedure, a specific provider, or a specific day. A random sample strategy can provide an excellent baseline assessment of briefing and debriefing practices in your unit.

## How To Use This Data

Share the results of your audit with your safety program teams, as well as the entire surgical team. Highlight areas where the team excels and opportunities for improvement. The audit data can provide insight into any education gaps and may identify defects in the delivery of care. Be prepared to discuss with frontline staff the deeper reasons behind strengths and weaknesses. You can use the AHRQ Safety Program for Surgery Toolkit to guide your team through the quality improvement intervention design process.

Operating Room Briefing and Debriefing Audit Tool

Observer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Start time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Stop time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Audit code: \_\_\_\_\_\_\_\_\_\_

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| **LOGISTICS**   |  | | --- | | **Who** initiated the briefing? | | ☐ Surgery Attending  ☐ Anesthesia Attending  ☐ Surgery Resident  ☐ Anesthesia Resident  ☐ Nurse  ☐ Anesthesia Certified Registered Nurse Anesthetist | | Was the initiator using a **script**? | | ☐ Yes  ☐ No | | **When** did the briefing occur? | | ☐ Before patient entered  ☐ Before induction  ☐ Before incision | | **BASICS**   |  |  |  | | --- | --- | --- | |  | **YES** | **NO** | | Did all **introduce** themselvesby **name?** |  |  | | Did all **introduce** themselvesby **role**? |  |  | | **Critical goals and steps** for case discussed? |  |  | | Pertinent **contingency plans** discussed? |  |  | | **Expectation for assertiveness** set? (e.g., “if anyone sees any problems, please speak up”) |  |  | | Explicit **opportunity for questions** or concerns? |  |  | | Explicit **request for confirmation** before moving on (e.g., “is everyone OK?”) |  |  | | **SPECIFIC CONTENT**   |  |  |  |  | | --- | --- | --- | --- | |  | **YES** | **NO** | **NA** | | Patient |  |  |  | | Procedure |  |  |  | | Site |  |  |  | | Patient consent |  |  |  | | Antibiotics given |  |  |  | | Antibiotics redosing time |  |  |  | | Beta blockers |  |  |  | | Airway risk |  |  |  | | Access issues |  |  |  | | Bleeding concerns (e.g., anticoagulant use) |  |  |  | | Blood availability |  |  |  | | Allergies |  |  |  | | Glycemic control |  |  |  | | Deep vein thrombosis prophylaxis |  |  |  | | Warmers |  |  |  | | Lab/radiology review |  |  |  | | Intraoperative imaging (X-rays, ultrasound) |  |  |  | | Patient positioning |  |  |  | | Prep application |  |  |  | |

**PARTICIPATION**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PARTICIPANTS** | **PRESENT** | **PAUSED OTHER TASKS** | **SPOKE UP** | **WHAT ISSUES WERE RAISED?** |
| *Surgery* Attending |  |  |  |  |
| *Surgery* Resident |  |  |  |  |
| *Anesthesia* Attending |  |  |  |  |
| *Anesthesia* Resident |  |  |  |  |
| *Anesthesia* Certified Registered Nurse Anesthetist |  |  |  |  |
| *Circulator* |  |  |  |  |
| *Scrub Registered Nurse or Technician* |  |  |  |  |
| *Other* |  |  |  |  |

**DEFINITIONS**

**Present**: physically present in the room

**Paused other tasks**: not engaged in other tasks while the briefing was occurring

**Spoke up**: participated in conversation

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