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| **Procedure Information** | |  |
| Patient age: \_\_\_\_\_\_\_ | Time of incision: \_\_\_:\_\_\_ AM / PM | Urgent/emergent case (requiring same-day completion): Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Yes Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png No |
| Patient gender: Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png M Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png F | Surgical end time: \_\_\_:\_\_\_ AM / PM | Significant nonclinical disruptions: Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Yes Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png No |
| Surgeon’s specialty: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | Case delayed >30min: Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Yes Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png No |
| Procedure performed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | Patient disposition: Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Inpatient Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Outpatient |
|  | | |
| **Observer Information** | |  |
| Observer age: \_\_\_\_\_ | Observer gender: Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png M Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png F | Years in current role at this hospital: \_\_\_\_ |
| Observer role: Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Nurse Manager Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png QI / Patient Safety personnel Description: Description: Captain Oats:Users:mattlcus:Desktop:Circle.png Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |

The statements in the table below relate to surgical team members’ interactions during this procedure. Please consider the following definitions as you read them:

**Clinical leadership**: Exerting control or playing a decision-making role in the patient’s clinical care. Any member of the team may demonstrate clinical leadership in the course of a surgical procedure.

**Team members**: Any individual present and participating in a surgical procedure (e.g., physicians, nurses, surgical techs).

**Clinical tasks**: The specific activities performed by team members in the course of a surgical procedure.

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| On a scale of 1 – 5, with 1 being “NEVER”, 2 being about 25% of the time, 3 being about half the time, 4 being about 75% of the time, and 5 being “ALWAYS”, please indicate how often the following behaviors occurred **during this procedure**: | | | | | | | | | | |
|  | | | **Never** | | | **Always** | | | | |
| 1. Clinical leadership was shared among disciplines in response to changes in the patient's condition or issues that arose during the operation. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 2. Physicians were open to suggestions from nurses. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 3. Physicians were present and actively participating in patient care prior to skin incision. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 4. Physicians maintained a positive tone throughout the operation. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 5. Verbal communication among team members was easy to understand (e.g., clearly articulated and spoken at an adequate volume). | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 6. Team members shared key information as it became available. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 7. Speakers made a visual or spoken effort to confirm that important information was received. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 8. Recipients made a visual or spoken effort to confirm that they understood the information communicated. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 9. Team members appeared eager to help one another. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 10. Team members from different disciplines discussed the patient’s condition and the progress of the operation. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 11. Plans for patient care were adapted as needed. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 12. Clinical tasks were well coordinated among team members. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 13. Team members referred to each other by role instead of name (e.g., “Nurse” instead of “Dana”). | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 14. Discussions took place in a calm, learning-oriented fashion. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 15. Team members reacted appropriately when their potential errors or mistakes were pointed out. | Macintosh HD:Users:mvk:Dropbox:Work:Checklist:Checklist Instruments:- Checklist Survey Images:Circle.png | N/A | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 16. Potential errors or mistakes were pointed out **without** raised voices or condescending remarks. | Macintosh HD:Users:mvk:Dropbox:Work:Checklist:Checklist Instruments:- Checklist Survey Images:Circle.png | N/A | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 17. Team members made certain that their concerns were understood by other team members. | Macintosh HD:Users:mvk:Dropbox:Work:Checklist:Checklist Instruments:- Checklist Survey Images:Circle.png | N/A | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| 18. Team members appeared to struggle **and did not** ask one another for help. | Macintosh HD:Users:mvk:Dropbox:Work:Checklist:Checklist Instruments:- Checklist Survey Images:Circle.png | N/A | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |
| On a scale of 1 – 5, with 1 being “POOR” and 5 being “EXCELLENT”, please rate your overall impression of how well team members worked together **during this procedure**: | | | | | | | | | |  |
|  | | | **Poor** | | | | **Excellent** | | | |
| 19. Please rate surgical teamwork during this procedure. | | | Captain Oats:Users:mattlcus:Desktop:Circle 1.png | Captain Oats:Users:mattlcus:Desktop:Circle 2.png | Captain Oats:Users:mattlcus:Desktop:Circle 3.png | | | Captain Oats:Users:mattlcus:Desktop:Circle 4.png | Captain Oats:Users:mattlcus:Desktop:Circle 5.png | |

◼ Please use the back of this form to provide further comments.◼