Objectives

* To describe the key components of a successful relationship between the OR and SPD.
* To describe the need for effective communication strategies between the OR and SPD to achieve departmental goals.
* To discuss methods to achieve alignment between the OR and SPD.
Background

* ORs
  * traditionally processed their own instruments; pulled their own supplies for cases
  * knew surgeons, their preferences and were able to anticipate needs
  * entire process under their control
  * little specialty instrumentation
  * few standards impacting on sterilization practices
Background

* SPDs
  * processed floor and department trays
  * instrument experience limited
  * some sterilized OR trays
  * lack of exposure to OR processes
  * few standards impacting on sterilization practices
Realities- OR

- Focus is on **patients**
- Time constraints
- High stress environment
- Changing/evolving surgical procedures/instrumentation
- Depends on SPD for instruments and/or medical-surgical supplies (e.g. case carts)
- Staff usually specializes in 1-2 services
Realities - SPD

- Focus is on **things** (e.g. instruments)
- Don’t have to directly deal with surgeons
- Have to deal with multiple departments
- High stress environment
- Staff needs to know all instrumentation
Why Is This Important?

* Both departments impact patient safety, organizational risk (liabilities), OR& SPD efficiency and productivity.
* Need to discuss operations of both departments to understand opportunities to achieve goals of department & organization.
What Are the Key Components of a Successful Partnership?

• OR understands:
  • The nature and sophistication of the work performed in SPD
  • Regulatory impact on SPD
  • Impact of standards on SPD
  • Demands of multiple departments on SPD
  • Understands the processes required for patient safety
What Are the Key Components of a Successful Partnership?

* SPD understands:
  * Need for patient safety and patient/surgeon satisfaction
  * Complexity of the OR cases
  * Surgeon’s needs to perform complex surgery
  * OR time and cost constraints
No business can be successful unless there is effective
- Communication
- Collaboration
- Cooperation

Need to set-up systems to provide for accuracy and accountability
Establish regular communications between OR and SPD

Two scenarios

- **No major issues** – processes working effectively
  - Utilize Process Improvement forms to communicate issues with trays or supplies provided by SPD
  - Meet monthly (lunch?) to catch up on departmental developments
  - Attend each others staff meeting to discuss major news, (e.g. new procedure/surgeon requiring new instrumentation, new standard/regulation impacting processing, etc.)
**Partnering**

- **Major issues** – continual complaints about services and or supplies
  - Need frequent meetings (e.g. daily/weekly)
  - Document all issues
  - Develop PI Committee to address issues
#1 issue in OR - dissatisfaction is surgical instrumentation

When a surgeon is dissatisfied they complain to the OR nurse

Repeated complaints present problems for the OR staff who have to face the surgeons each day
Surgeons – regardless of their surgical skill – require instrumentation to perform surgery

Instrumentation must be
- Clean
- Functional
- Complete (all parts present)
- Sterile

Anything less is a breach of the standard of care to the patient
When instrumentation is not ready or not acceptable for use the care to the patient is delayed

- Delays in the OR are costly
- Causes operational problems; domino effect
- Can affect case load for remainder of the day
- Surgeons have a schedule as well; have specific times allocated to do surgery and then office hours
Financial Impact

- Loss time in the OR = lost $$$$$$ 
- Average cost $1,200 per hour 
- Instrument problems can cost the facility thousands of dollars annually in lost revenue
Financial Impact

* Average cost for an OR/hour $3,960*
* If your facility has 4 ORs and SPD causes delay of 1 hour/week per OR =
  * 4 x 1 = 4 hours/week x $3,960 = $15,840
  * $15,840 x 52 weeks = $823,680/year!

* *Health Care Advisory Board*
Why Do Conflicts Occur?

* When the OR’s expectations are not met
* When a patient’s care is delayed or adversely affected
* When a commitment is not met (promised a tray for a specific time and it does not get done)
What Needs to Be Done?

- Examine your surgical instrument processing
- Perform a Quality Assessment – need to know where you are starting
- Identify problem areas
- Develop policies and procedures for handling instruments from the OR to SPD and back to the OR
Quality Assessment

- Compile statistics with complaints about surgical instruments or supply issues
- Document on a Process Improvement form
- Coordinate a PI Committee
  - Include OR, Process Improvement
- Work on the high volume/high impact problems first
- Develop policies and procedures to prevent recurrences of problems (e.g. supply issues)
- Develop training programs for SPD as identified
Four Rules of Surgical Instrument Processing (Chobin)

* #1 – Must have thorough training and competency verification for SPD staff
* #2 – Must start with quality surgical instruments
* #3 – Must have policy to define process
* #4 – Must monitor compliance with policies
Quality Issues Results In……..

It's Monday, go to work!

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Processing Cycle

Instruments placed back in respective container; enzymatic foam or gel applied

Instruments sent to SPD for reprocessing in timely manner

Instruments reprocessed according to IFUs and prioritized based upon OR schedule

Sets returned to OR or placed in storage
What Can Go Wrong?

* Instruments not placed back in respective container
* Causes delays in reprocessing (looking for instruments)
* Can increase instrument loss and damage
What Can Go Wrong?

* Instruments not treated with enzyme
* Requires longer time to clean instruments
* Affects turn around time
* Can contribute to instrument damage
Problem Solving

- Develop policy with OR for handling instruments at the end of the surgical procedure
- Include need to account for all instrumentation (count on all cases)
- Monitor for compliance and report results to OR and SPD teams
What Can Go Wrong?

* Turn Around Times
* OR not aware of turnaround time for specific sets based on manufacturer’s IFUs
* Leads to booking errors (booking cases with insufficient time to reprocess sets according to IFUs)
* Leads to case delays
What Can Go Wrong?

* Loaner Sets not received in sufficient time to reprocess according to IFUS
* May rush check-in process
* If new to facility, no time for staff inservice = errors
* Insufficient processing time can lead to short cuts = patient safety issue
What Can Go Wrong?

- Need to review IFUs with OR
- SPD may rush to process sets resulting in inadequate cleaning or wet sets (sets overloaded in sterilizer or released before completely cool)
* Develop policy for Loaner Instruments requiring instruments arrive in sufficient time to completely reprocess according to IFUs (24 hours? 48 hours?)
  * Track compliance; report non-compliance
* Need cooperation of OR, loaner representatives
* Surgeons need to be aware of extended protocols many orthopedic and neuro loaner sets require
* Monitor compliance with policy
What Can Go Wrong?

- Sets incomplete, instruments in poor condition, instruments not functional (e.g. scissors dull)
- Instruments contain bioburden or other foreign matter
- Chemical indicator(s) missing
- Damage to packaging (holes, tears)
- Sets not ready for scheduled case time
- Sets wet
• Are count sheets accurate/current? Specify instrument name, catalog # and complete description?
• Has SPD staff been inserviced in care, handling and testing of instruments?
• Have competency verifications been performed for SPD staff on general instrument care and handling?
• Are lighted magnifying lamps available and used to inspect instruments for cleanliness and defects?
Problem Solving

* What is the process for handling wrapped sets in OR and SPD?
* Is there a routine sharps maintenance process?
* Is there monitoring of the sterilization loads to determine overloading the sterilizer?
Has SPD staff been inserviced with competencies verified for all basic and loaner instrumentation?
  * Cleaning, disassembly, sterilization?
Has the OR been appraised of the extended processing requirements for specific sets?
Was there communication to the OR regarding ability to process sets in requested time frame?
Is there a Priority Processing protocol in SPD? Who monitors for compliance?

- Assign specific SPD staff to processing priorities to ensure completion
- Have a method to identify trays that require priority processing?
PRIORITY ALERT – PROCESSING

NOTE: To expedite Priority Processing, please complete this form and attach to the outside of the case cart/bin or other method of transport to SPD. Please call SPD to confirm a Priority Processing is being sent.

The following item(s) is required IMMEDIATELY.

Item(s) being sent:

The item(s) are needed by (time):__________________
The item(s) are to be: _____cleaned only and returned for flash Sterilization
                _____ cleaned and wrapped sterilization

Room number:_______ Nurse:___________________

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SPD COMPLETE

Time items received in Decontam:________________________
Received by (name):____________________________________
Items completed Decontamination (Time):____________________
Items completed prep/assembly by ___________ Time:________
Items placed in sterilizer by ___________ Time in:_________________
Returned to OR fully decontaminated by__________Time:_______
Returned to OR Sterilized at (time):_______________________
OR Personnel accepting item(s):___________________________

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Does SPD management perform audits of trays and items processed? Frequency?

- Ongoing monitoring identifies problems that may go unnoticed

What is the method of communications within SPD to ensure OR receives items before they are needed?

- End of Shift Report?
- Huddle
Problem Solving

- Is MBWA practiced?
- Are sterilization loads reviewed for accuracy in sterilization parameters and loading?
- How are sterile wrapped items handled from SPD to the OR and in the OR? Assessment made?
Stacking Leads to Damage
Problem Solving

- Are storage areas cleaned and inspected monthly?
- Is the integrity of packaging inspected before dispensing?
Problem Solving

- Have all in-house sets been weighted to ensure they are 25 lbs or less?
- Have all loaner sets been reconfigured (if needed) by the vendor so they do not exceed 25 pounds (with the container?)
Partnerships

* OR and SPD impact on each other
* Cannot survive unless we work together for the common goal of patient safety
* Need to develop a team of proactive players who can effectively deal with issues
Remember.....There is no “I” in TEAM!!
DEFUSING EMOTION to discuss the real issue

- Tend to blame other person/department immediately for the problem
- Objectivity key to success
- Subjectivity is the greatest enemy
EMOTIONS - fuel conflict, reduce objectivity, increases defensiveness – difficult when patients involved
Two things people want to hear:
1) “I understand what you are saying” and
2) “I am going to help you”

Natural response is to defend oneself.

Need to acknowledge the problem then resolve it.

Need to acknowledge that not all requests are possible.
LISTENING and accepting the person’s perceived issue

Make sure you understand the issues and constraints.

Ask “What do I need to do”?

Clarify the request, re-state the request.

Identify that you will need to look into the request and identify a timeline for your response.
Communications

- INVESTIGATION
- Identify complaint, issue or request.
- Obtain all the information you need.
- Inform key stakeholders of the issue and outline your investigation process.
- Identify plan for communicating your information to involved departments
May need more time in this step.

Collect data, references, standards.

Solicit help from other people if needed (e.g. Infection Control, Risk Mgmt).

Time can be valuable asset; lessens the emotions; defuses the issues.
Problem Solving Strategies

- COLLABORATION
- Working together towards resolution
- The objective is to understand each other’s perspectives and agree to negotiate a win/win situation
Problem Solving Strategies

- RESOLUTION
  - How conflict is resolved determines how future conflicts will be addressed.
  - Everyone must agree to close issue and move forward.
  - Identify opportunity for next discussion.
  - May be easier said than done!
Effective Communication Strategies

- Speak in objective, non-threatening manner.
- Be non-judgmental.
- Present facts.
- Avoid trying to defend yourself.
- Stay on the issue
Effective Communication Strategies

* Important part of process is to agree how to move forward with future discussion topics.

* Prevention is a great component of conflict management.
Effective Communication Strategies

* AVOID THE BLAME GAME and FINGER POINTING!
Learn to work with all members of the team

Each team member from OR and SPD must make a commitment to the desired results or they won’t happen!

Each team member needs to be willing to contribute.

Must have a mutual trust and respect between each department.
Develop process to report problems
  * e.g. QA problem report form
Discuss in weekly meetings (can gradually decrease to monthly meetings)
Discuss PROCESS not the people
When problem identified take action to prevent recurrences
Report back on progress made

Don’t discuss situations when you are “fired up” - keep the EMOTIONS out of it!

Identifying and resolving problems leads to mutual respect and trust

Does not occur overnight---takes time and patience!
Collaboration & Success

- For interdepartmental conflict “walk a mile in my shoes” concept works great
- SPD should spend time in the OR to see how their actions impact on patient care
- OR should spend time working in SPD to see how the pace and work load affect their daily routine
Remember

* The problems/issues between departments did not occur overnight therefore they will not get resolved overnight!
* Need time to change people and processes if you want the change to be permanent.
Summary

* Treat others as you would like to be treated
* We are customers to each other
Summary

* Life is too short
* Stress from work is taken home
* Need to work smarter... not harder
* Be willing to listen and take on responsibility
* “Walk the walk and talk the talk”!
* Celebrate your success!!