

## **Principles-Based Procedure Checklists to Use with All Procedures**

### **PROCEDURE STEPS**

#### **Before Approaching the Patient:**

- a. Checks records (e.g., medication record) or obtain an order, if necessary.
- b. Obtains signed informed consent, if needed.
- c. Washes hands; dons procedure gloves, if needed.
- d. Gathers supplies and equipment before approaching patient.
- e. Obtains assistance, if needed (e.g., to lift a patient).

#### **Preparing the Patient:**

- a. Introduces self and instructor to patient.
- b. Identifies patient: reads wrist band, and asks patient to state his name.
- c. Makes relevant assessments (e.g., takes vital signs) to ensure that the patient still requires the procedure, is able to tolerate it, and that there are no contraindications.
- d. Explains procedure to the patient, including what he will feel and is expected to do (e.g., "You will need to lie very still").
- e. Provides privacy (e.g., Asks visitors to step out, drapes appropriately).
- f. Uses good body mechanics: positions bed or treatment table to a working level; lowers the near side rail.

#### **During the Procedure:**

- a. Washes hands before touching the client, before gloving, and after removing gloves.
- b. Observes universal precautions (e.g., dons and changes procedure gloves when needed).
- c. Maintains sterility when needed.
- d. Maintains correct body mechanics.
- e. Provides patient safety (e.g., keeps side rail up on far side of bed).
- f. Continues to observe the patient while performing the procedural steps.
- g. Performs procedure in an acceptable period of time.
- h. Demonstrates coordination in handling equipment.
- i. Follows correct procedural steps.

#### **After the Procedure:**

- a. Evaluates patient's response to the procedure.
- b. Leaves patient in a comfortable, safe position with call light within reach.
- c. If client is in bed, returns bed to low position and raises side rail (if client requires this precaution).
- d. Dispose of supplies and materials according to agency policy.
- e. Washes hands again before leaving the room.
- f. Documents that procedure was done; documents patient's responses.

## PROCEDURE CHECKLIST

### PRINCIPLES-BASED CHECKLIST TO USE WITH ALL PROCEDURES

Procedure Title \_\_\_\_\_

Check (✓) S (Satisfactory) or (✗) NI (Needs Improvement)

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