



Improving Surgical Clerking Documentation: Clerking Proforma

Background:

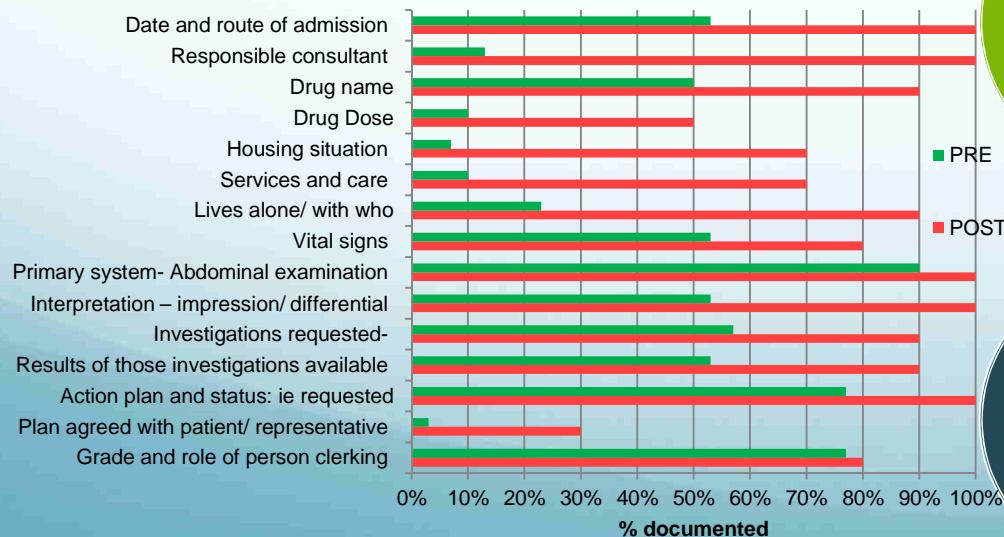
The surgical clerking, or the initial documentation of contact with the surgical team, is the primary documentation of the presenting issue, the patients background the diagnosis and subsequent plan.

2. We studied 30 surgical clerkings over 3days and measured the results. The following was documented (see fig 1):

- 13% - Responsible consultant
- 20% - Any social history
- 53% -Any results of investigations
- 53%- Vital signs recorded
- 53% -Impression/differential
- 77%- Any plan documented

4. Trial of the form showed the following improvements in documentation (fig 1) :

Social history – 100% Impression- 100% Plan: 100%



1. What is the problem

1. The initial documentation is used as a vital source of information in:

- Ascertaining the presenting complaint and history
- Providing the history for senior review and thus treatment planning
- Summarising admissions for communication with the GP on discharge
- Getting quick access to information in an emergency
- Allowing a summary of presenting complaints for new teams and new team members

2. How big is the problem?

3. Introduction of a standardised proforma:

- 1x A3 booklet
- Brightly coloured to be easily identified
- Boxes to include drug, social, medical history
- Results documentation section
- Clear section for a impression and plan
- Safety checklists
- Post take ward round and senior review to be include in the same sheet to include DNAR review and EDD.

3. The solution

4. The results

5. Proforma feedback:

- Helps focus junior doctors clerking
- Ensures all information in one places
- Used widely on SAU
- Helpful to all MDT

5. The impacts

6. The Future

6. Sustainability and maintaining change:

- Continued use on SAU and A&E
- To be rolled out officially from August
- Engage the nursing and clerical staff