

SOP Template: Pre-operative Patient Assessment and Verification

This SOP details the process of **pre-operative patient assessment and verification**, including reviewing patient medical history, conducting physical examinations, verifying surgical site and procedure, confirming patient identity, assessing anesthesia risks, ensuring informed consent, and coordinating with the surgical team. The purpose is to enhance patient safety, prevent surgical errors, and ensure readiness for surgery through thorough assessment and accurate verification prior to the operation.

1. Purpose

To outline standardized procedures for pre-operative patient assessment and verification to reduce risk and ensure patient safety before surgery.

2. Scope

This SOP applies to all healthcare providers involved in the surgical pathway, including surgeons, anesthesiologists, nurses, and administrative staff in **[Facility Name]**.

3. Responsibilities

- **Surgical Team:** Ensures accurate verification and readiness of patient.
- **Anesthesiologist:** Assesses anesthesia risks and patient suitability.
- **Nursing Staff:** Coordinates assessment documentation and performs key verifications.
- **Administrative Staff:** Collects and maintains pre-operative documentation and consent forms.

4. Procedure

1. Review Patient Medical History

- Obtain comprehensive medical, surgical, and medication history.
- Document allergies and previous anesthesia or surgery complications.

2. Conduct Physical Examination

- Perform focused physical exam with emphasis on systems relevant to the planned procedure.
- Document vital signs and relevant findings.

3. Verify Surgical Site and Procedure

- Confirm surgical site, side, and procedure through patient records and consent forms.
- Mark the surgical site in presence of the patient when relevant.

4. Confirm Patient Identity

- Use at least two identifiers (e.g., name, date of birth) to confirm identity.
- Cross-check identity with consent form and medical records.

5. Assess Anesthesia Risks

- Perform anesthesia risk assessment (ASA classification, airway evaluation, etc.).
- Review laboratory and diagnostic test results required for anesthesia plan.

6. Ensure Informed Consent

- Verify that the patient (or legal representative) has provided written informed consent for procedure and anesthesia.
- Clarify risks, benefits, alternatives, and answer all patient questions.

7. Coordinate with Surgical Team

- Communicate findings, special considerations, or concerns to surgical and anesthesia teams.

- Ensure documentation is complete and accessible in the patient's health record.

5. Documentation

- Assessment forms
- Consent forms
- Pre-operative checklist
- Progress notes and anesthesia records

6. References

- Joint Commission Universal Protocol for Preventing Wrong Site, Wrong Procedure, Wrong Person Surgery
- World Health Organization (WHO) Surgical Safety Checklist
- Local hospital and regulatory guidelines

7. Revision History

Date	Version	Description	Author
[Insert Date]	1.0	Initial SOP creation	[Insert Name]