

Standardizing Epic Indicators for Patient Progression in the Perioperative Setting: A Quality Improvement Project

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Background

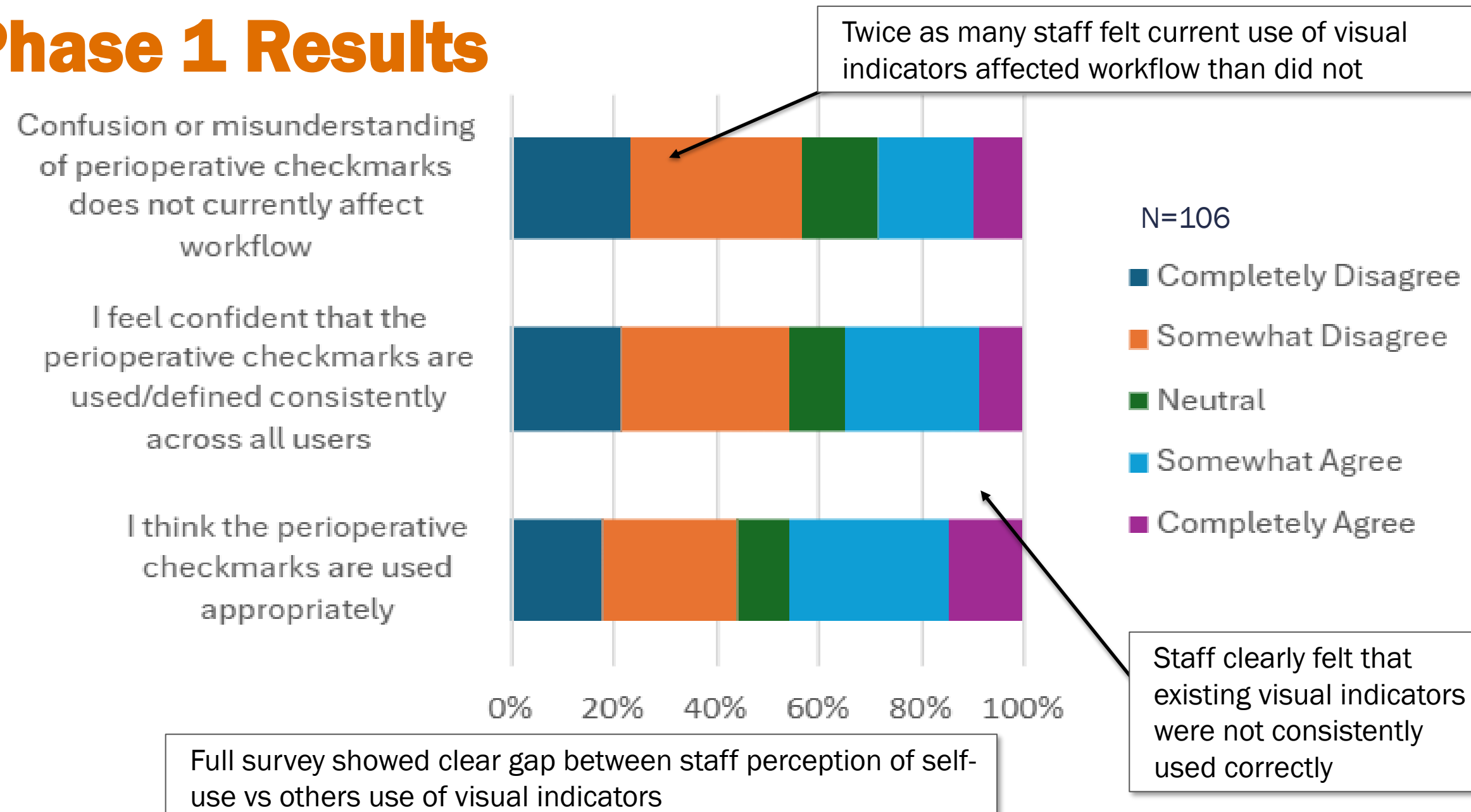
- Variation in how clinicians define Epic visual indicators (checkmarks) that mark patient progression in the perioperative setting leads to recurring communication failures, delays, and workflow inefficiencies
- Existing reference documents contained outdated and inconsistently defined checkmark criteria

The purpose of this quality improvement project was to reduce perioperative delays related to patient progression.

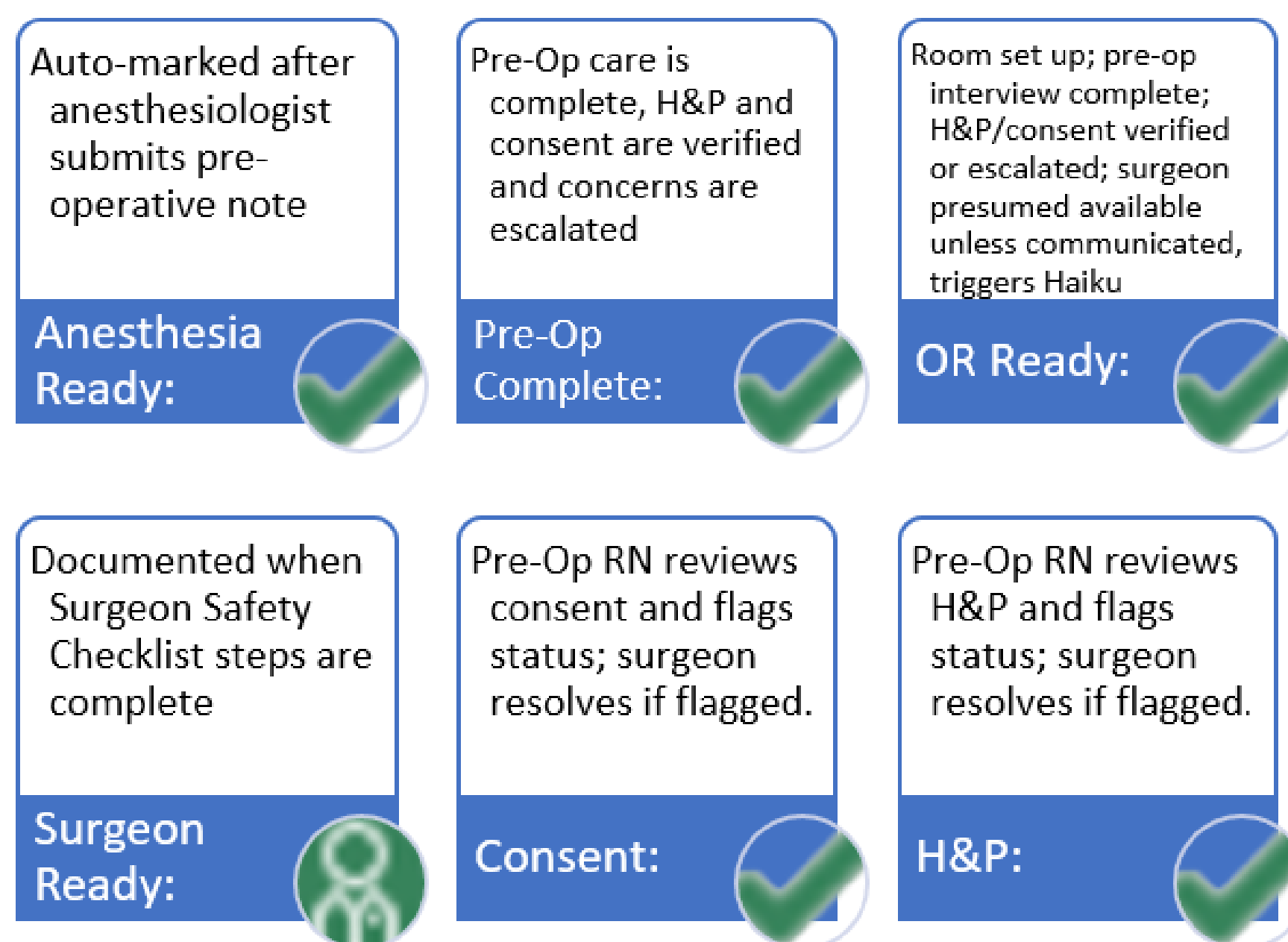
Methods

- Setting: 4 surgical sites and 55 ORs in a health system
- Phase 1: July 2025 – December 2025
 - Anonymous electronic surveys measuring multidisciplinary perception of Epic visual indicators
 - Focused workgroups and process mapping with teams to define and standardize workflows and Epic visual indicators
- Phase 2: December 2025 – May 2026
 - Education and implementation of standardized workflow and checkmark definitions across all sites
 - Anonymous surveys re-distributed at week 4 post implementation
 - Compare delays pre and post intervention
 - Ethical considerations include transparency, bias and fairness

Phase 1 Results



Final Standardized Workflow and Definitions



Adjustments Included:

- Consent separate from RN workflow
- H&P to mimic consent workflow
- Surgeon acknowledgment for H&P/consent concerns
- Stagger to align with circulator and anesthesia workflow
- Haiku notification to increase communication efficiency

Implications for Nursing

- Success is found in collaboration with all relevant stakeholders (Nursing, Anesthesia, Surgeons, Epic)
- Process mapping and interdisciplinary collaboration was successful in creating a standardized workflow and definitions of Epic visual indicators
- Challenges included: role delineation gaps, data limitations, inconsistent surgeon engagement, and iterative refinement of the workflow and definitions.
- Stagger considerations aligned with workflow through addition of event time for identifying OR set up complete without notification

Conclusions

- Through collaborative efforts, we standardized our visual checkmark system.
- Phase 2, Step 1: dissemination and education started December 2025
- Phase 2, Step 2: implementation of standardized workflow and checkmark definitions begins March 2026. After 4 weeks, redistributed surveys will measure staff perception of checkmark usage, and OR delays.



References and more information available upon request from Mary Carrion at mc4fg@uvahealth.org or via QR code:

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