Guidelines for Nursing Documentation in Gastrointestinal Endoscopy
Acknowledgments

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This document was prepared and written by the members of SGNA Education Committee and adopted by the SGNA Board of Directors in 2013. It is published as a service to SGNA members.

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Table of Contents
Preface........................................................................................................................................4
Definition of Terms..................................................................................................................4
Procedure Phases....................................................................................................................5
   A. Pre-Procedure Phase........................................................................................................5
   B. Intra-Procedure Phase.....................................................................................................6
   C. Post-Procedure Phase......................................................................................................7
Summary......................................................................................................................................8
References.................................................................................................................................9
Appendix
   1. Minimum Data Set
Preface

Documentation development is guided by the use of the nursing process (assessment, planning, intervention, and evaluation) and helps establish consistent yet individualized plan of care for patients during endoscopy.

This guideline is intended to provide direction for healthcare providers in establishing consistent patient care documentation for endoscopy. Healthcare team members are encouraged to keep current on changes in documentation.

Documentation should clearly and uniformly record details that accurately describe situations or events occurring to patients undergoing endoscopy or related procedures. This guideline incorporates Centers for Medicare and Medicaid Services (CMS) requirements, as well as recommendations from The Joint Commission and Accreditation Association for Ambulatory Health Care, Inc. (AAAHC). Various members of the health care team may be responsible for documenting specific items in the patient record.

In order to provide information that is easily adaptable to each patient care environment, the guideline is divided into three major components: Pre-Procedural, Intra-Procedural, and Post-Procedural. The intent is to provide information and criteria that can be selected in formulating an individualized document that meets the needs and requirements that conform to institutional policy.

Each institution must comply with applicable regulations and guidelines. These include but are not limited to state regulations, The Joint Commission guidelines, CMS requirements, and the institution’s standards for the monitoring of patients.

Definition of Terms

For the purpose of this document, the following terms are defined:

**Hand off** refers to an up-to-date exchange of information between caregivers regarding the patient’s condition, care, treatment, medication, services, and any recent or anticipated changes (Runy, 2008; The Joint Commission, 2012).

**Intra-Procedural Phase** begins with the time-out and at the beginning of sedation until the completion of the diagnostic or therapeutic procedure.

**Medication Reconciliation** refers to the accurate and complete reconciliation of medications across the continuum of care and includes name, dose, route, frequency, and purpose (The Joint Commission, 2012).

**Post-Procedural Phase** refers to the period of time from the completion of diagnostic or therapeutic procedure until the patient is discharged.

**Pre-Procedural Phase** refers to the period of time prior to the patient entering the procedure room.

**Procedural team** refers to the individual performing the procedure, a registered nurse, and a technician. It may also include anesthesia providers and other active participants who will be participating in the procedure.
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

**Time-out** refers to a verification process done immediately before starting the procedure where procedural team members agree, at a minimum, to the correct patient, correct procedural site, and correct procedure (The Joint Commission, 2013).

**Universal Protocol** refers to a process designed to avoid wrong patient, wrong site surgery and includes three components: a pre-procedure verification, site marking, and a time out (The Joint Commission, 2012).

**Vital signs** refer to a patient’s temperature, heart rate, respiratory rate, blood pressure, pain, oxygen saturation assessment, and may also include capnography. Components used may vary depending on procedural phase and institutional requirements.

**A. Pre-Procedure Phase**
During this phase, an age-specific patient assessment is performed by a registered nurse in order to determine appropriate nursing care, treatment, and services that meet individualized patient requirements.

Patients should be reassessed as determined by the institution and state protocols but at a minimum as determined by the care, treatment, and services sought, the patient’s presenting condition(s), and whether the patient agrees to care, treatment, and services (The Joint Commission, 2012).

The following data are recommended to be included during this phase:
1. Patient identification using a minimum of two patient identifiers (The Joint Commission, 2012)
2. Physical assessment, individual needs, and procedure(s) to be performed (Burden, DiFazio, O’Brien, & Dawes, 2000). Assessment to include, but not limited to:
   a. Date/time
   b. Baseline vital signs, including pain assessment. When applicable, may include:
      i. Cardiac monitoring
      ii. Capnography
   c. Warmth, dryness, and color of skin (Potter, Perry, Stockert, & Hall, 2012)
   d. NPO status (Afelbaum et al., 2011)
   e. Results and type of bowel prep (if applicable) (Bjorkman & Popp, 2006)
   f. Fall risk assessment
   g. Pregnancy status (American Society for Gastrointestinal Endoscopy [ASGE], 2012)
   h. Nutritional status
   i. Abdominal assessment
   j. Height and weight
   k. Activities of daily living: independent, requires assistance, total dependence (Burden et al., 2000)
   l. Emotional and psychological needs; spiritual and cultural beliefs (Burden et al., 2000)
   m. Possible abuse, neglect, or exploitation (The Joint Commission, 2012)
3. Allergies and reactions to include prescribed and over-the-counter medications, herbals, food, environmental sensitivities, contrast media, and latex
4. Signed/Witnessed informed consent
5. Sedation scoring system to include but not limited to (Standards of Practice Committee of the American Society for Gastrointestinal Endoscopy, 2008):
   a. Level of consciousness/mental status
   b. Airway/respiratory status/oxygen saturation
   c. Circulation
   d. Activity
6. Disposition of patient valuables (e.g., glasses, jewelry, etc.) (Potter et al., 2012)
7. Presence of removable dental appliances, loose teeth, glasses/contact lenses, hearing aids, piercings (Potter et al., 2012)
8. Presence of prosthetic devices (e.g., hip replacement, valves), pacemakers, mechanical assist devices, internal defibrillators, and implantable devices (e.g., insulin pump)
9. Medication reconciliation
10. Labs or previous procedures results (if applicable)
11. Intravenous line to include type, site, inserted by, rate of IV solution or presence of venous access device (O'Grady et al., 2011)
12. Known significant medical diagnoses and conditions (e.g., gag reflex, current status of infectious disease/exposure, oncology treatments, physical disabilities, and conditions) (Burden et al., 2000)
13. Past medical/surgical history and invasive procedures, history of complications, or reactions to previous sedation, analgesia, or general anesthesia (Burden et al., 2000)
14. Physician required documentation
   a. History and physical
   b. American Society of Anesthesiologists (ASA) Classification
   c. Airway assessment (i.e., jaw and neck mobility) (American Association for the Study of Liver Diseases et al., 2012; Gross et al., 2002)
15. Educational needs assessment to include (The Joint Commission, 2012):
   a. identification of barriers to learning
   b. learning style preference
   c. ability to comprehend information provided (Burden, et al, 2000)
   d. pre-procedure education
   e. post procedure instructions/patient or responsible person’s signature of receipt
      i. availability and name/access number of responsible adult
      ii. availability of safe transport home
16. For pediatric patients: all items listed also to pertain to pediatric patients (Conners, Cravero, Lowrie, Scherrer, & Werner, 2013)
17. Advance Directives, as applicable
18. Hand-off communication to receiving caregiver
19. Registered nurse signature, date, and time

**B. Intra-Procedure Phase**

Every patient undergoing a diagnostic, therapeutic, or invasive procedure requires monitoring by a registered nurse or other qualified personnel (Society of Gastroenterology Nurses and Associates, Inc. [SGNA], 2012). Documentation should include the event, intervention (if necessary) and outcome.

The following data are recommended to be included during this phase (The Joint Commission, 2012):

1. Time-out
2. Procedural team
3. Equipment and alarms reviewed and set
4. Ongoing patient assessment
   a. Vital signs (American Association for the Study of Liver Diseases et al., 2012). When applicable, may include:
      i. Cardiac monitoring
      ii. Capnography
   b. Pain assessment
   c. Abdominal assessment
   d. Level of consciousness
   e. Warmth, dryness, and color of skin
   f. IV maintenance
      i. Site
      ii. Type and amount of all fluids administered (including blood and blood products) (The Joint Commission, 2012).
5. Patient positioning
6. Name and dosage of all drugs and agents used (including oxygen and contrast media), time, route of administration, by whom, and patient response (The Joint Commission, 2012)
7. Abdominal pressure if applicable
8. Fluoroscopy exposure time, if applicable (SGNA, 2008)
9. Equipment/accessories relevant to the procedure
10. Grounding pad location and skin condition pre and post procedure
11. Endoscopic therapies utilized during procedure (e.g., clips, stents, drains, bands, tubes)
12. Adverse events
13. Specimen collection
14. Procedure performed/findings
15. Start and end time. May include:
   a. endoscope insertion
   b. endoscope removal
16. Disposition of patient; discharge criteria met
17. Hand-off communication to receiving caregiver
18. Signature(s), date, and time

C. Post-Procedure Phase
The frequency of the assessment is determined by institutional/departmental policy, the physician and/or the registered nurse. The following data are recommended to be included during this phase (The Joint Commission, 2012):
1. Start time of post-procedure phase
2. Ongoing patient assessment appropriate to patient’s age, needs, and procedure performed (American Association for the Study of Liver Diseases et al., 2012);
   a. Vital signs, including pain assessment. When applicable, may include
      i. Cardiac monitoring
      ii. Capnography
   b. Sedation scoring system to include but not limited to:
      i. Level of consciousness/mental status
      ii. Airway/respiratory status/oxygen saturation
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

iii. Circulation
iv. Activity
c. Gag reflex if applicable
d. Abdominal assessment
e. IV maintenance
   i. Site
   ii. Type and amount of all fluids administered (including blood and blood products) (The Joint Commission, 2012).
   iii. IV disposition (i.e., maintain, lock, discontinue)
3. Name and dosage of all drugs used (including oxygen), time, route of administration, by whom, and patient’s response (The Joint Commission, 2012)
4. Intake and output
5. Adverse events, interventions, and outcomes (The Joint Commission, 2012)
6. Age specific, individualized discharge instructions reviewed and provided to patient and/or accompanying adult per institutional policy (The Joint Commission, 2012).
   May include, but not limited to:
   a. Follow-up and specific patient orders written by the physician
      i. Medication reconciliation
      ii. Diet and activity
      iii. Signs/symptoms of possible complications
      iv. Follow up appointments
   b. Emergency contact numbers
   c. Community resources available (if applicable)
   d. Educational materials (The Joint Commission, 2012)
7. Disposition of patient
   a. Location (e.g., hospital room, home, x-ray)
   b. Patient’s belongings returned (Potter et al., 2012)
   c. Accompany responsible adult/transporter (Gross et al., 2002)
   d. Mode of transportation out of the department (e.g., ambulatory, stretcher, wheelchair)
8. Hand-off given to subsequent healthcare provider, if applicable (The Joint Commission, 2012)
9. Time of discharge and signature of discharge nurse

Summary
This document has been compiled using current guidelines on documentation along with published data. SGNA anticipates that these recommendations will help healthcare providers establish a comprehensive institutional documentation policy.

As an additional resource, the Minimum Data Set is included as Appendix 1. The Minimum Data set is defined as the basic essential elements necessary to document delivery of patient care in the gastrointestinal endoscopic setting. The Minimum Data set complements the Guidelines for Nursing Documentation by providing more detailed data sets.
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

References


**Recommended Reading**


**APPENDIX 1: SGNA Minimum Data Set**

### PRE-PROCEDURE

| Date |  
| Time of arrival AM/PM |  

#### History obtained from:
- [ ] Patient
- [ ] Spouse
- [ ] Parent
- [ ] Child
- [ ] Sibling
- [ ] Friend
- [ ] Significant other
- [ ] Other

#### Arrival mode
- [ ] Ambulatory
- [ ] Wheelchair
- [ ] Stretcher

#### Transportation
- [ ] Private
- [ ] Public

#### Arrived with:
- [ ] Alone
- [ ] Spouse
- [ ] Parent
- [ ] Child
- [ ] Sibling
- [ ] Friend
- [ ] Significant other

#### Discharge arrangements
- [ ] Driver
- [ ] In Lobby
- [ ] Need to call
  - [ ] Signed generic post-op instructions
  - [ ] Yes
  - [ ] No
  
  Date:  
  
  Time:

### Reason for Procedure

*(use ICD9 codes if automated)*
- [ ] Abdominal pain
- [ ] Colorectal Cancer Screening
- [ ] Constipation
- [ ] Bleeding
- [ ] Dysphagia
- [ ] GERD/heartburn
- [ ] IBS
- [ ] Pain
- [ ] Other

### Scheduled procedure

*(pick multiple choices)*
*(link this to post procedure to link with actual procedure performed)*
- [ ] EGD
  - [ ] Scheduled
  - [ ] Repeated
  - [ ] Unscheduled
- [ ] Endoscopic Ultrasound (EUS)
- [ ] Fine Needle Aspiration (FNA)
  - [ ] Scheduled
  - [ ] Repeated
- [ ] Flexible Sigmoidoscopy
  - [ ] Scheduled
  - [ ] Repeated
  - [ ] Unscheduled
- [ ] Colonoscopy
  - [ ] Scheduled
  - [ ] Repeated
  - [ ] Unscheduled
- [ ] ERCP
  - [ ] Scheduled
  - [ ] Repeated
  - [ ] Unscheduled
- [ ] Dilatation
  - [ ] Scheduled
  - [ ] Repeated
  - [ ] Emergency
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

- Manometry & Motility
  - Biliary
  - Esophageal
  - Rectal
  - Scheduled
  - Repeated
- 24-hour pH
  - Scheduled
  - Repeated
- Capsule Endoscopy
  - Scheduled
  - Repeated

### Pre-op teaching

<table>
<thead>
<tr>
<th>Date:</th>
<th>Time:</th>
</tr>
</thead>
</table>

**Method**
- [ ] Verbal
- [ ] Written
- [ ] Video
- [ ] Reason for procedure
- [ ] Verbalizes understanding

### Individuals present for teaching

- [ ] Patient
- [ ] Spouse
- [ ] Parent
- [ ] Child
- [ ] Sibling
- [ ] Friend
- [ ] Significant other

### Verbalized understanding of teaching content:

- [ ] Patient
- [ ] Spouse
- [ ] Parent
- [ ] Child
- [ ] Sibling
- [ ] Friend
- [ ] Significant other

### Potential barriers to learning

- Anxiety level
- Cognitive ability
- Hearing
- Language
- Sight

### Primary language

- [ ] English
- [ ] Spanish
- Other
  - [ ] Translator utilized

### Pre-op contact

<table>
<thead>
<tr>
<th>Date:</th>
<th>Time:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Person contacted</th>
<th>Relationship</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Person who initiated contact</th>
<th>Reason:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] No</td>
<td></td>
</tr>
</tbody>
</table>

### Procedure and patient verified

<table>
<thead>
<tr>
<th>Reason:</th>
<th>No</th>
</tr>
</thead>
</table>

- [ ] Patient
- [ ] Physician
- [ ] Family/significant other

### Patient issued:

- [ ] ID band
- [ ] Allergy ID band
- [ ] Mastectomy band
  - [ ] Not indicated
- [ ] Shunt band
  - [ ] Not indicated

**Comments:**
People present for teaching (write in names)

Comments:

Review of medical history

Previous sedation analgesia problems
- Fainted
- Hyperexcitability
- Hypotension
- Persistent nausea
- Persistent vomiting
- Prolonged sedation
- Tachycardia
- Unstable blood pressure
- None

Patient allergies
- Latex
- Meds
- Food
- Dye (radiology)
- Other

Previous medical procedures
- Mastectomy
  - Right
  - Left
- Shunt
  - Right
  - Left

Heart
- Automatic internal cardiac defibrillator
- Hypertension
- Pacemaker
- Valve replacement
- Other

Lung
- Asthma
- Chronic obstructive pulmonary disease
- Ostomy
- Liver/GI
  - Yes (Comments: free text field)
- Kidney/ GU
  - Yes (Comments: free text field)
- Airway (Mallampati classification per MD)
  - 1-4

Mouth opens adequately
- Airway patent
- Neuro/seizures
- Sleep apnea

Orthopedic
(flag intraprocedure grounding pad/pad placement)
- Appliance
  - Neck
  - Back
  - Upper extremity
    - Left
    - Right
  - Lower extremity
    - Left
    - Right

Significant family history
- Colorectal cancer
- Gardner syndrome
- Peutz-Jaegers Disease
### Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

**Medications**
- Anticoagulants
  - Aspirin
  - Coumadin
  - Plavix
  - Heparin
    - Date last taken
    - Time last taken
- Herbals
  - Date last taken
  - Time last taken
- MAO inhibitors
  - Date last taken
  - Time last taken
- Nonsteroidal anti-inflammatories
  - Date last taken
  - Time last taken

**History of:**
- Glaucoma
- Previous endoscopic procedures (list)
- Previous surgeries (list)

**Exposure to:**
- HIV
- Hepatitis A
- Hepatitis B
- Hepatitis C
- Sexually Transmitted Disease
- TB
- Other (free text)

**Endocrine**
- Insulin dependent/non-insulin dependent
- Last blood glucose
  - Date
  - Time

**Substance use**
- Alcohol
  - Amount (free text)
  - None
- Caffeine
  - Amount (free text)
  - None

**Drugs**
- Yes
  - History of (free text)
- None

**Tobacco**
- Amount (free text)
- Years
- None

**Condition upon arrival**

<table>
<thead>
<tr>
<th><strong>Activity</strong></th>
<th><strong>Respiration</strong></th>
<th><strong>Circulation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to move 4 extremities (2)</td>
<td>Deeply breaths, coughs freely (2)</td>
<td>Systolic BP +/- 20 mmHg pre-procedure level (2)</td>
</tr>
<tr>
<td>Able to move 2 extremities (1)</td>
<td>Dyspnea or limited breathing (1)</td>
<td>Systolic BP +/- 20 mmHg to 50 mmHg pre-procedure level (1)</td>
</tr>
<tr>
<td>Able to move 0 extremities (0)</td>
<td>Apneic (0)</td>
<td>Systolic BP +/- 50 mmHg or more of pre-procedure level (0)</td>
</tr>
</tbody>
</table>
Consciousness
- Fully awake (2)
- Arises on calling (1)
- Unresponsive (0)

Color
- Pink (2)
- Pale, dusky, blotchy, jaundiced (1)
- Cyanotic (0)

Arrived in unit with oxygen at _______ liters

How administered
- Cannula
- Mask
- Tracheostomy
- ET tube

Pain
- No
- Yes
  - Location
  - Duration
    - 0-10
  - What 0-10 would be acceptable for patient?
  - Frequency
  - Symptoms relieved by
  - Symptoms worsened by
    - Description
      - Free text

Vital sign base line readings
- Blood pressure
- Pulse
- Respiratory rate
- O2 SAT
- Capnography (CO2)
- Temperature

Sedation plan
- Moderate
- Deep
- General
- Local
- Topical

General Assessment

Skin temperature
- Warm
- Cool

Skin status
- Dry
- Moist
- Intact
  - Yes
  - No
  - Body piercing
  (free text to note location)
  - Other

Follows command
- Yes
- No

Psychological state
- Agitated
- Anxious
- Cooperative
- Oriented
- Restless
- Tranquil

Weight
- Stated
- Actual

Height
- Stated
- Actual
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

Pregnant
☐ No
☐ Yes
☐ Physician notified
☐ Date of last menstrual period

Respiratory Assessment
☐ Clear
☐ Congested

Abdominal assessment
☐ Distended
☐ Firm
☐ Flat
☐ Nontender
☐ Round
☐ Soft
☐ Tender

Intravenous (IV) access
☐ Extremity restriction
☐ Left
☐ Right
☐ New insertion
☐ Time
☐ Name of person inserting/credentials
☐ Type of IV
(need option for more than 1 IV)
☐ Size
☐ Number of attempts
☐ Patency
☐ Peripheral
☐ Angiocath
☐ Butterfly
☐ Other
☐ Central
☐ Triple lumen
☐ Port
☐ Site
☐ L Hand
☐ R Hand
☐ L posterior forearm
☐ R posterior forearm
☐ L anterior forearm
☐ R anterior of forearm
☐ L anticubital space
☐ R anticubital space
☐ Other
☐ Solution
☐ D5/W
☐ Normal saline
☐ Lactated ringers
☐ D5 1/2 NS
☐ D5 1/4 NS
☐ Packed red blood cells
☐ Platelets
☐ Fresh frozen plasma (FFP)
☐ Amount remaining
☐ Rate ordered
☐ Other
☐ Arrived with IV access in place
☐ Type of IV (need option for more than 1 IV)
☐ Size
☐ Number of attempts
☐ Patency
☐ Peripheral
☐ Angiocath
☐ Butterfly
☐ Other
☐ Central
☐ Triple lumen
☐ Port
Site
- L Hand
- R Hand
- L posterior forearm
- R posterior forearm
- L anterior forearm
- R anterior of forearm
- L antecubital space
- R antecubital space
- Other

Solution
- D5/W
- Normal saline
- Lactated ringers
- D5 1/2 NS
- D5 1/4 NS
- Packed red blood cells
- Platelets
- Fresh frozen plasma (FFP)
  - Amount remaining
  - Rate ordered
- Other

Risk/screen
- Abuse
  - Physical
  - Emotional
  - Mental
  - Verbal
  - Sexual
- Fall risk
- Nutrition
- Psychosocial

Comments:

Preparation for procedure
- NPO
- Last solid food
  - Date
  - Time
- Last liquids ingested
  - Date
  - Time

Bowel prep
- Type
  - PEG solution
  - Biscodyl tablets
  - Biscodyl suppositories
  - Fleets enema
  - Fleets oral
  - Citrate of Magnesia
  - Tap water enemas
  - Soap suds enemas
  - Visical
  - Other
  - Taken as instructed
    - Yes
    - No
      - Reason
  - Description of last stool
    - Consistency
      - Liquid
      - Semi-solid
      - Solid

Oral Assessment
- Dentures
  - Yes
    - Removed
      - Upper
      - Lower
- Loose teeth
  - Yes
    - Location
- Tongue pierced
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

- Color
  - Clear
  - Yellow
  - Brown
  - Other

**Review of lab results**
- None ordered
- Within normal limits
- Physician notified of abnormality
- Not available

**Advance directives**
- Living will
  - Yes
  - No
- Additional information provided for patient
- Patient does not wish more information
- Durable power of attorney for medical affairs

**Belongings removed**
- Dentures
- Glasses
- Hearing aids
- Other

**Disposition**
- With patient
- With significant other
- Other
- Who completed assessment
  *(track staff with number system- unique identifier per facility policy)*

Comments:
**Guidelines for Nursing Documentation in Gastrointestinal Endoscopy**

**INTRA-PROCEDURE**

**Procedural information**

**Scopes**
- □ Yes
- ☐ Scope utilized (drop down box with all available scopes)
  - ☐ Not applicable
  - ☐ Scope ID number
- ☐ Time scope inserted in patient
- ☐ Time endoscopist reached cecum (*only for colonoscopy*)
- ☐ Time scope removed from patient

**Events/Occurrences**
- ☐ None
- ☐ Abdominal pressure applied
  - (*link to colonoscopy/flex sigmoidoscopy procedures*)
- ☐ Allergic reaction
- ☐ Anatomical variances
- ☐ Compromised airway
  - ☐ Required airway support
    - ☐ ET tube
    - ☐ Jaw lift
    - ☐ Oral airway
    - ☐ Nasal trumpet
    - ☐ AMBU bag
- ☐ Dental injury
- ☐ Equipment malfunctioning
- ☐ Equipment not available
- ☐ Failed sedation
  - ☐ Anesthesia called
  - ☐ Procedure terminated
- ☐ Incomplete bowel prep
- ☐ Incomplete procedure
- ☐ Nausea
- ☐ O2 at 10% < baseline for 2 minutes or more and/or 85%
- ☐ Required cardiopulmonary resuscitation (airway and circulation)
- ☐ Required cardiovascular medication administration
  - (*list of meds comes up when drug given*)

**Procedure and Patient re-verified**
- ☐ Yes
  - ☐ Patient
  - ☐ Physician
  - ☐ Family/significant other

**Verify allergies with patient**
- ☐ Yes

**Verify sedation planned**
- ☐ Yes

**Verify consent forms signed**
- ☐ Procedure
- ☐ Sedation
- ☐ Observation (people in the room)
- ☐ Permission to discuss findings with
  - ☐ Procedure Room number
  - ☐ Time entered room

**Personnel**
- ☐ Nurse (*drop down menu, free text*)
- ☐ GI Tech (*drop down menu, free text*)
- ☐ Radiology Tech
  - (*drop down menu, free text*)
- ☐ Attending physician
  - (*drop down menu, free text*)
- ☐ Fellow (*drop down menu, free text*)
- ☐ Pathologist (*drop down menu, free text*)
- ☐ Resident (*free text*)
- ☐ Student (*free text*)
- ☐ Observer (*free text*)
guidelines for nursing documentation in gastrointestinal endoscopy

- required reversal agent administration (comes up when drug given)
- suspected aspiration
- suspected perforation
- unanticipated bleeding
- uncooperative patient
- vomiting

**Vital signs**
- Blood pressure
- Heart rate
- Heart rhythm
- Respiratory rate
- O2 saturation
- Capnography (CO2)
- Oxygen at _____ liters
  - Time initiated
  - Time discontinued
  - How administered
    - Cannula
    - Mask
    - Tracheostomy
    - ET tube

In some situations, ICU nurse will be asked to stay to monitor patients in this condition; provision for linking to ICU documentation forms would be helpful.

Comments:

**Specimens**

(need option for multiple site selections with number of specimens and cm level 0-60)

**Organ**

- Esophagus
  - Mid _______ cm
  - Proximal ________ cm
  - Distal ________ cm
  - Random

or

- _____ specimens at ________ cm

- Stomach
  - Esophagogastric junction
  - Cardia
  - Body
  - Fundus
  - Antrum
  - Pylorus
  - Random
  - H Pylori

- Duodenum
  - Duodenal bulb

- Jejunum
- Biliary tract
  - Ampulla
  - Common bile duct
  - Common hepatic duct
  - Pancreatic duct

- Colon
  - Ileocecal valve
  - Ascending
  - Splenic flexure
  - Transverse
  - Hepatic flexure
  - Sigmoid

- Rectum
- Anus

Number of specimens from each site 
(minimum 0, maximum 60)

- Location (text)

**Sent to laboratory for:**

- Cytology
- Pathology
- Microbiology

- Specimens labeled and documented
  (Labels to be generated by above information)
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

Media

Documentation video of

☐ #
☐ Disposition
☐ To patient
☐ To archives
☐ Documentation photo of

☐ #
☐ Disposition
☐ To patient
☐ To archives
☐ To chart

Comments:

Therapeutic devices

☐ Bicap hemostasis/heater probe
  ☐ Manufacturer
  ☐ Serial #
  ☐ Probe size
  ☐ Coagulation power (0-10)
  ☐ Watts

☐ Biopsy forceps
  ☐ Hot
    ☐ upper
    ☐ lower
  ☐ Cold
    ☐ upper
    ☐ lower
  ☐ Both

  ☐ Manufacturer
  ☐ Identification code
  ☐ Number used
  ☐ Type
    *(drop down menu per institution)*

☐ Capsule
  ☐ Signal verified
  ☐ Lot #
  ☐ Time ingested

Cautery

  ☐ Manufacturer
  ☐ Serial # / Unit ID
  ☐ Settings
  ☐ Watts
    ☐ Monopolar
      ☐ Cut (0-10 or range)
      ☐ Coag (0-10 or range)
      ☐ Blend (0-10 or range)
    ☐ Bipolar
      ☐ Cut (0-10 or range)
      ☐ Coag (0-10 or range)
      ☐ Blend (0-10 or range)

☐ Argon plasma coagulator
  ☐ Serial #/ Unit ID
  ☐ Manufacturer
  ☐ Site *(pull from specimen list)*
  ☐ Gas Flow (check?)
  ☐ Watts
  ☐ Seconds
  ☐ Pulses #
  ☐ Watt seconds (multiplication of watts x seconds)

  ☐ Balloons
    ☐ Manufacturer
    ☐ Serial #
    ☐ Size(s)
      ☐ French
      ☐ Length
    ☐ PSI (Pounds per square inch)
    ☐ Time (minutes, seconds)
Grounding Pad
- Placement
  - Thigh
    - L
    - R
  - Other
- Skin preparation
  - Yes
  - No
  - Not applicable
- Skin condition at pad removal
  - Same as preprocedure
  - Erythematous
  - Abrasion
  - Other

Cytology brush
- Manufacturer
- Identification code
- Number used
- Type (drop down per institution)

Drain/stent
- Type
  - Biliary
  - Colonic
  - Esophageal
  - Nasal Biliary
  - Pancreatic
  - Rectal
- Manufacturer
- Serial #
- French (customize - pull from inventory) cm
- Length

Dilatation
- Balloons
  - Manufacturer
  - Serial #
  - Size(s)
    - French
    - Length
  - PSI (Pounds per square inch)
  - Time (minutes, seconds)
- Bougie
  - Maloney
    - French
    (multiple choice per institution, free text)
  - Hurst
    - French
    (multiple choice per institution, free text)
  - Savary
    - Millimeters

EMR Kit
- Manufacturer
- Serial # / Unit ID
- Site

Endocut
- Type of probe
- Filter change
- Medications
  - Epinephrine
  - Normal saline

ERCP
- Basket
  - Serial #
  - French
- Cannulas
  - Serial #
  - French
- Dilatation catheter
  - Serial #
  - French
- Papillotome
  - Serial #
  - French
<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stone retrieval</td>
<td>Balloon&lt;br&gt;Serial #&lt;br&gt;French</td>
</tr>
<tr>
<td>Foreign body retrieval</td>
<td>Basket&lt;br&gt;Biopsy forceps&lt;br&gt;Magnet&lt;br&gt;Net&lt;br&gt;Rat tooth&lt;br&gt;Snare&lt;br&gt;Tripod&lt;br&gt;Other (free text)</td>
</tr>
<tr>
<td>Fine needle aspiration needle</td>
<td>Manufacturer&lt;br&gt;Serial # / Unit ID&lt;br&gt;Size</td>
</tr>
<tr>
<td>Guide wires</td>
<td>Manufacturer&lt;br&gt;Serial #&lt;br&gt;Size(s)&lt;br&gt;Number&lt;br&gt;Type</td>
</tr>
<tr>
<td>Injection therapy</td>
<td>Site (from specimen list)&lt;br&gt;Needle serial #&lt;br&gt;Size&lt;br&gt;Medications/solutions&lt;br&gt;Epinephrine&lt;br&gt;Ethanolamine&lt;br&gt;India ink&lt;br&gt;Normal saline&lt;br&gt;Sodium morruate&lt;br&gt;Sodium tetradeyl&lt;br&gt;Dilution&lt;br&gt;Total amount&lt;br&gt;Increments&lt;br&gt;Number of injections</td>
</tr>
<tr>
<td>Laser</td>
<td>Serial # / Unit ID&lt;br&gt;Manufacturer&lt;br&gt;Site&lt;br&gt;Gas Flow (check)&lt;br&gt;Joules&lt;br&gt;Seconds&lt;br&gt;Pulses (#)&lt;br&gt;Joules Seconds (multiplication of watts times seconds)</td>
</tr>
<tr>
<td>Motility/manometry catheter</td>
<td>Type&lt;br&gt;Water perfused&lt;br&gt;Solid state&lt;br&gt;Placement&lt;br&gt;Esophageal&lt;br&gt;Location&lt;br&gt;R Nares&lt;br&gt;L Nares&lt;br&gt;Oral&lt;br&gt;___________ cm</td>
</tr>
<tr>
<td>Rectal</td>
<td>__________ cm&lt;br&gt;Biliary&lt;br&gt;Pancreatic</td>
</tr>
<tr>
<td>Percutaneous endoscopic gastrostomy/jejunostomy</td>
<td>Manufacturer&lt;br&gt;Serial #&lt;br&gt;French (range)</td>
</tr>
<tr>
<td>pH Probe</td>
<td>Manufacturer&lt;br&gt;Serial #&lt;br&gt;Unit ID&lt;br&gt;Placement&lt;br&gt;Location&lt;br&gt;R Nares&lt;br&gt;L Nares</td>
</tr>
</tbody>
</table>
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

- Oral
  - _________ cm
- On medications
  - Yes
  - No
- Time probe inserted
- Date probe inserted
- Time probe removed
- Date probe removed

- Snares
  - Manufacturer
  - Serial #
  - Size(s)
  - Number
  - Type

- Spray catheter
  - Acetylcysteine
  - Lugols solution
  - Methylene Blue

- Variceal ligation
  - Banding
    - number of bands
    - site

- Standard equipment in room *(optional to list)*
  Comments:

  **Sedation monitoring**

- Aldrete scoring
  - Activity
    - Able to move 4 extremities (2)
    - Able to move 2 extremities (1)
    - Able to move 0 extremities (0)

- Respiration
  - Deeply breaths, coughs freely (2)
  - Dyspnea or limited breathing (1)
  - Apneic (0)

- Circulation
  - Systolic BP +/- 20 mmHg pre-procedure level (2)
  - Systolic BP +/- 20 mmHg to 50 mmHg pre-procedure level (1)
  - Systolic BP +/- 50 mmHg or more of pre-procedure level (0)

- Consciousness
  - Fully awake (2)
  - Arises on Calling (1)
  - Unresponsive (0)

- Color
  - Pink (2)
  - Pale, dusky, blotchy, jaundiced (1)
  - Cyanotic (0)

**Patient position(s)**
- Decubitus
- Fowlers
- Lateral
  - Left
  - Right
- Prone
- Semi-fowlers
- Supine
- Trendelenburg

**Oral suction**
- Yes
- No

**Transportation to recovery room**
- Ambulatory
- Wheel chair
- Via stretcher with side rails up

**Intravenous fluids**
*(have system do the math to give total at end) (match pre-procedure list)*
- Solution
  - D5/W
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

- Normal saline
- Lactated ringers
- D5 1/2 NS
- D5 1/4 NS
- Packed red blood cells
- Fresh frozen plasma
- Platelets
  - Total amount infused
  - Site
- Other

☐ Discontinued time
  - Catheter tip intact
    - Yes
    - No
  - Site with edema
    - Yes
    - No
  - Site with erythema
    - Yes
    - No

Medications
(computer enter name of administrator/time of administration)
- Antibiotics
  - Bowel prep
    - Fleets enema
    - PEG solution
  - Intervventional medications
    - Cholecystokinin
    - Glucagon
    - Metaclopramide
    - Simethicone

☐ Sedation
  - Diphapnhydramine
  - Droperidol IV
  - Fentanyl IV
- Meperidine IV
- Midazolam IV
- Naxolone IV
- Promethazine IV
- Propofol
- Romazicon IV
- Other (free text)

☐ Topical anesthetics
  - Benzocaine Spray PO
  - Lidocaine viscous
  - 2% Lidocaine jelly

☐ Other medications
  - Acetylcysteline
  - Atropine
  - Epinephrine IV
  - Lugols solution
  - Lidocaine injectable
    - 2%
    - 4%
  - Methylene Blue
  - Sincalide IV
  - Free text

Radiation (Fluoroscopy)
☐ Patient shielded
  - Yes
  - No
  - Not applicable
☐ Fluoroscopy settings
☐ Contrast media
  - Amount
  - Type
    - Ionic
      - Full
      - Half
    - Non-ionic
      - Full
      - Half
    - Gastrografin
☐ Total fluoroscopy time
☐ Time out of room
Comments:
**POST-PROCEDURE**

- Time admitted to recovery

**Procedure(s) performed**
*(link to procedure(s) scheduled)*

- Capsule Endoscopy
  - Scheduled
  - Repeated
- Colonoscopy
  - Scheduled
  - Repeated
  - Emergency
- Dilatation
  - Scheduled
  - Repeated
  - Emergency
- EGD
  - Scheduled
  - Repeated
  - Emergency
- ERCP
  - Scheduled
  - Repeated
  - Emergency
- EUS
  - FNA
  - Scheduled
  - Repeated
- Flexible sigmoidoscopy
  - Scheduled
  - Repeated
  - Emergency
- Manometry and Motility
  - Biliary
  - Esophageal
  - Rectal
  - Scheduled
  - Repeated

- 24 hour pH
  - Scheduled
  - Repeated

**Vital signs**

- Blood pressure
- Heart rate
- Heart rhythm
- Respiratory rate
- O2 saturation
- Capnography (CO2)
- Oxygen at _____ liters
*(link from pre-procedure)*

  - Time initiated
  - Time discontinued
  - How administered
    - Cannula
    - Mask
    - Tracheostomy
    - ET tube

- Skin temperature
  - Warm
  - Cool

- Skin status
  - Dry
  - Moist
  - Intact
    - Yes
    - No
    ○ Body piercing
      *(free text to indicate location)*
  - Other

**Additional Tests**

- EKG
- Glucometer
  - Blood glucose level
  - Time
  - Other
- Lab *(drop menu with list)*
- Radiology *(drop menu with list)*
Discharge instructions
(be sure JCAHO requirements are covered here)

Diet (can choose more than one)
☐ As tolerated
☐ Clear liquid
☐ Full liquid
☐ Gluten free
☐ High fiber
☐ Low fiber
☐ Low fat
☐ Return to normal
☐ Small frequent meals
☐ Soft
☐ Other (free text)

Limitations (These are examples – customize for individual institution)
☐ Do not drive any vehicle, drink alcohol, operate any dangerous equipment - such as power tools, lawn mowers, etc., or make any major decisions for at least 12 hours.
☐ Do not eat any solid food for one hour following the completion of the procedure.
☐ Do not take any aspirin, Advil, Nuprin, Alleve, BC powder, or ibuprofen for 7 days. Tylenol is acceptable.
☐ Fluids – encourage to drink
☐ Medication instructions
☐ Prescriptions provided
☐ Rest at home for the next 12 hours

☐ Questions invited and answered
  ☐ Yes
  ☐ No
  ☐ Narrative (text)

Follow up appointment
☐ Office
☐ Procedure

Emergency follow up indicated for:
(examples – customize for individual facility)
☐ Any gastrointestinal bleeding > 1 tablespoon
☐ Any pain or red streaks near your IV site
☐ Nausea or vomiting lasting over 2 hours
☐ Referred pain to shoulder/neck area
☐ Severe or unusual abdominal discomfort or pain
☐ Temperature over 101 degrees F
☐ Call Dr. __________________________ immediately at phone # __________________________

Post procedure teaching
☐ Date
☐ Time
☐ Method
  ☐ Verbal
  ☐ Video
  ☐ Written
☐ Verbalizes understanding
☐ Individuals present for teaching
  ☐ Patient
  ☐ Spouse
  ☐ Parent
  ☐ Child
  ☐ Sibling
  ☐ Friend
  ☐ Significant other
☐ Teaching content verbalized as understood by:
  ☐ Patient
  ☐ Spouse
  ☐ Parent
  ☐ Child
  ☐ Sibling
  ☐ Friend
  ☐ Significant other
Potential barriers to learning
- Anxiety level
- Cognitive ability
- Hearing
- Language
  - Primary language
  - Translator utilized
- Sight
- Teaching content
  (drop-down menu with common discharge instruction worksheets to identify which one(s) were given to the patient/family/etc.)
- People present for teaching
  (write in names)

Post procedure devices in place
(those inserted during procedure)
- ET tube
- PEG/PEJ
- Rectal tube
- Stent (link to intraprocedure entry)

Post procedure devices retrieved
- Discharged with devices in place
- Retrieved prior to discharge
  - ET tube
  - PEG/PEJ
  - Rectal tube
  - Stent (link to intraprocedure entry)

Occurrences
- Admitted to hospital
- Allergic reaction
- Anesthesia
- Aspiration
- Bleeding
- Code
- Flumazemil administration
- Intubation
- IV infiltration
- Naloxone administration
- Nausea
- Perforation
- Readiness for discharge greater than 2 hours
- Vomiting
- Comments:

Discharge
- Inpatient
  - Returned to room
  - Admitted to ICU
  - Transferred to another facility
  - Transported by
    - RN
    - LVN
    - Tech
    - Other
- Outpatient
  - Home
  - Admitted to room
  - Admitted to ICU
  - Returned to ER
  - Transferred to another facility
  - Accompanied by (specify name)
    - Family
    - Significant other
    - Ambulance staff
- Transportation
  - Public
  - Private
- Mode
  - Ambulatory
  - Wheel chair
  - Stretcher
- Report
  - Called
  - Given to
  - Given by
  - Not applicable
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

Assessment

- Abdominal assessment
  - Soft
  - Firm
  - Round
  - Flat
  - Distended
  - Tender
  - Nontender
  - Ascites
  - Passing flatus
- Gag reflex present
- Tolerating PO fluids

Intravenous access

- Site(s)
- Solution
  - D5/W
  - Normal saline
  - Lactated ringers
  - D5 1/2 NS
  - D5 1/4 NS
  - Packed red blood cells
  - Fresh frozen plasma (FFP)
  - Other
- Total amount infused
- Total amount remaining (system should calculate from amt. hung and amt. infused.)
- Discontinued time
- Type of dressing applied
- Catheter tip intact
  - Yes
  - No
- Site with edema
  - Yes
    - Site care instructions offered
  - No
- Site with erythema
  - Yes
    - Site care instructions offered

Aldrete scoring

- Activity
  - Able to move 4 extremities (2)
  - Able to move 2 extremities (1)
  - Able to move 0 extremities (0)
- Respiration
  - Deeply breaths, coughs freely (2)
  - Dyspnea or limited breathing (1)
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  - Fully awake (2)
  - Arises on Calling (1)
  - Unresponsive (0)
- Color
  - Pink (2)
  - Pale, dusky, blotchy, jaundiced (1)
  - Cyanotic (0)

Pain

- No
- Yes
  - Location
  - Duration
    - 0-10
    - What 0-10 would be acceptable?
  - Frequency
  - Symptoms relieved by
  - Symptoms worsened by
  - Description
    - Free text

Belongings returned

- Dentures
- Glasses
- Hearing aids
- Other
Guidelines for Nursing Documentation in Gastrointestinal Endoscopy

**Discharged by:** (drop down menu with list of staff)

Comments