

FLEXIBLE BRONCHOSCOPY EDUCATION PROJECT

CHECKLISTS

**Subject: Introduction to Flexible Bronchoscopy
Competency Program**

Henri Colt MD, FCCP
Professor of Medicine
University of California, Irvine
hcolt@uci.edu

Bronchoscopy International™
Non-profit organization dedicated to education and
the global dissemination of knowledge*
www.Bronchoscopy.org



*The Foundation for the Advancement of Medicine is a 501-3C non-profit organization

This page intentionally left blank



The **Bronchoscopy Education Project** is a uniform curriculum designed to provide bronchoscopy educators with competency-oriented tools and materials that can be incorporated in whole or in part into various training programs. Materials can be used to train student bronchoscopists and assess progress along the learning curve from novice to competent practitioner.

This project is based on **FIVE** key concepts:

1. Mandatory reading, including review of open-access web-based materials in the form of video clips, photo atlases, and written manuals provides a uniform foundation of theoretical and practical knowledge.
2. Step-by-step instruction, simulation scenarios, training models, and small group workshops allow technical skill and experiential knowledge acquisition for existing and newly introduced technologies and procedures.
3. Checklists using a uniform template enhance procedural standardization, patient safety, and implementation across procedural platforms.
4. Patient-centered practical approach exercises help practitioners rationalize the various components of the decision-making process (strategy and planning; equipment, techniques and results; outcomes and quality improvement), thus reinforcing their acquisition of cognitive, technical, affective and experiential knowledge.
5. Assessment tools, readily applied in the clinical as well as simulation setting enhance learning, and document progression along the learning curve from novice to competent practitioner.

The Bronchoscopy Education Project includes three parts, to be completely developed by Bronchoscopy International and a host of international experts. As they come to completion, these components, designed using a uniform template and development philosophy, will be disseminated and implemented at the national and international level with the added endorsement and collaboration of university medical centers, regional physician groups, national societies, and international organizations.

A series of *Train the Trainers* seminars are being conducted to familiarize a cadre of bronchoscopy educators with general educational philosophies and methodologies, and to provide opportunities to learn and practice various elements of

The Bronchoscopy Education Project. We assume this cadre of educators will use some or all project materials in future regional or institution-based teaching programs. As a result of this work, it is our hope to facilitate the work of our professional colleagues by providing a uniform instructional framework that can be expanded, researched, and improved upon, and to alleviate patients from the burdens of procedure-related training. Increasingly knowledgeable and competent bronchoscopists will thus enhance their practice through a more rapid implementation of new technologies, and a better use of existing ones, all to the benefit of our patients.

Part I: *Introductory Course in Flexible Bronchoscopy.* This course addresses bronchoscopic inspection, lavage, brushing, endobronchial biopsy, transbronchial lung biopsy and conventional transbronchial needle aspiration.

Part II: *Endobronchial Ultrasound and EBUS-Transbronchial Needle Aspiration.* This course addresses Endobronchial Ultrasound physics, equipment (processors, bronchoscopes, needles, radial and linear array transducers), techniques including EBUS-TBNA, mediastinal anatomy, lung cancer staging according to universally accepted IASLC guidelines, and EBUS-radiographic-bronchoscopic correlations.

Part III: *Introduction to Interventional Flexible Bronchoscopy.* This course addresses flexible bronchoscopic resection techniques including electrosurgery and Nd:YAG laser, foreign body removal techniques and instrumentation, difficult airway management including difficult intubation and hemoptysis, flexible bronchoscopic stent and airway valve insertion, bronchoscopic techniques of electromagnetic navigation, and bronchial thermoplasty.

Train the Trainers Seminars: These hands-on seminars are specifically designed to familiarize participants with materials and techniques necessary for teaching each of the three other components of **The Bronchoscopy Education Project**. Each seminar targets mastery of didactic and associated reading materials, and provides opportunity to practice using checklists, assessment tools, practical approach patient-centered exercises, and simulation or role playing exercises. Debriefing and 360 degree feedback techniques are employed to foster teamwork, provide individual intrinsic value, and enhance individual as well as group performance.



Henri Colt MD., FCCP
hcolt@uci.edu



Eric Edell MD., FCCP
eedell@mayo.edu

BRONCHOSCOPY EDUCATION PROJECT



STUDENTS

Welcome to **The Bronchoscopy Education Project**. The purpose of this project is to provide bronchoscopy educators and training program directors in the United States and abroad with competency-oriented tools and materials with which to train student bronchoscopists and assess progress along the learning curve from novice to competent practitioner. Material can be incorporated in whole or in part, as needed by each program.

The foundation of this project is a standardized curriculum (schedule, content, checklists, assessment tools, training models, and train-the-trainers instruction) pertaining to an ***Introductory Course in Flexible Bronchoscopy***. In this section, you will find a collection of **CHECKLISTS** that can be used to enhance patient safety and monitor progress along the bronchoscopy learning curve.

- Informed consent checklist
- Procedural pause checklist
- Fluoroscopy checklist
- Moderate sedation checklist
- Practical approach checklist
- Proctored flexible bronchoscopy checklist
- Program completion checklist

The Bronchoscopy Education Project is ongoing and will be updated at www.bronchoscopy.org as components become available. We invite your comments as you use these materials.

Henri Colt MD., FCCP
hcolt@uci.edu

Eric Edell MD., FCCP
eedell@mayo.edu

Funding statement

Funding for The Bronchoscopy Education Project Materials is a result of Dr. Colt's philanthropic endeavors and from the general support of the University of California, Irvine. No corporate support was either solicited or received for this work.

Copyright statement

Copyright © 2011. Henri Colt MD. All Rights Reserved.

Permission to use, copy, modify, and distribute any part of this software including any source code and documentation for educational, research, and non-profit purposes, without fee, and without a written agreement is hereby granted, provided that the above copyright notice, and this paragraph appear in all copies of the documentation.

Bronchoscopy Education Project Disclaimer

Confidentiality of data potentially relating to individual patients and visitors has been respected. We strive to honor or exceed any legal requirements of medical/health information privacy as they apply to the United States and to the state of California.

Images and case descriptions provided here-in, therefore, are not intended for the diagnosis of any specific patient. Any information found on the website or in this text should not be used as a substitute for medical care.

The authors disclaim liability, injury, or damage incurred as a consequence from the use of information. Reference to websites, instruments, or equipment portrayed in this material is not of commercial nature, nor does the inclusion imply endorsement.

Should documents or images from this material be copied for personal use, we request that materials remain unedited and unmodified unless for teaching purposes, that no fee be charged for copies or access to the information, that copyright notices and disclaimers remain attached, and that credit be given to The Bronchoscopy Education Project (suggested format Bronchoscopy International© [www.http://bronchoscopy.org](http://bronchoscopy.org))

Scoring Recommendations for CHECKLISTS

(Moderate Sedation, Fluoroscopy, Informed Consent, Procedural Pause, Practical approach, Proctored Bronchoscopy, Program completion)

The goal of these checklists is to be able to monitor a student's progress along the learning curve from *novice* (Score < 60) to *advanced beginner* (Score 60-79), *intermediate* (score 80-99), and *competent* (score 100). The instructor should be able to ascertain, by observing the student's performance that each of the TEN elements in each tool are covered satisfactorily. The frequency with which these tools should be used remains to be studied and is currently at the discretion of program directors.

Repeated testing will demonstrate knowledge and skill acquisition as the student climbs the learning curve from novice to advanced beginner, intermediate and competent bronchoscopist for the procedure being assessed.

To maximize objective scoring, each task in the checklists has been defined explicitly in this user manual. Participation in specially-designed *Train-the-Trainers* courses being currently organized is encouraged to assist with standardization, and to help instructors use this program to its fullest potential.

Scores can be plotted on a graph, and each institution/program can obviously choose its own cut-offs for a PASS grade, although we recommend that a final PASS grade be achieved with a score of 100, in order for the student to be judged competent to perform bronchoscopy independently.

In the absence of a large pilot study demonstrating standard normograms as is done for high-stakes testing, consensus of world renowned experts was obtained to delineate cut-off scores for the following four categories.

Category	Score
Novice	< 60
Advanced Beginner	60-79
Intermediate	80-99
Competent	100

Specific instructions marked by an asterisk (*) are provided in each of the following checklists.

This page intentionally left blank.

MODERATE SEDATION 10-Point CHECKLIST*

Student _____ Training Year _____

Faculty _____ Date _____

Interactive session Patient environment

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
2. Definitions <input type="checkbox"/> Moderate sedation <input type="checkbox"/> Deep sedation	Yes / No
2. Able to obtain moderate sedation informed consent	Yes / No
3. Able to describe ASA classification <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	Yes / No
3. Able to identify high risk patients	Yes / No
4. Able to describe potential contraindications	Yes / No
5. Able to list equipment that must be available	Yes / No
6. Sedation agents: role, dosage, precautions <input type="checkbox"/> Midazolam <input type="checkbox"/> Fentanyl	Yes / No
7. Reversal agents: role, dosage, precautions <input type="checkbox"/> Flumazenil <input type="checkbox"/> Naloxone	Yes / No
8. Able to describe how to respond to complications such as <input type="checkbox"/> Vomiting <input type="checkbox"/> Seizure	Yes / No
9. Able to describe how to respond to over-sedation and <input type="checkbox"/> Hypotension <input type="checkbox"/> Airway obstruction	Yes / No
10. Able to describe how to respond to over-sedation and <input type="checkbox"/> Hypoxemia <input type="checkbox"/> Respiratory failure	Yes / No

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE **PASS** **FAIL** **SCORE** _____/100

This page intentionally left blank.

FLUOROSCOPY 10-Point CHECKLIST*

Student _____ Training Year _____

Faculty _____ Date _____

Interactive session Patient environment

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
1. Able to list indications for using fluoroscopy	Yes / No
2. Able to describe the relevance of voltage and amperage <input type="checkbox"/> For image quality <input type="checkbox"/> For patient safety	Yes / No
3. Able to describe consequences of resolution, distortion, and lag <input type="checkbox"/> For image quality <input type="checkbox"/> For patient safety	Yes / No
4. Able to describe consequences of brightness and contrast <input type="checkbox"/> For image quality <input type="checkbox"/> For patient safety	Yes / No
5. Able to describe dangers of scattered radiation	Yes / No
6. Able to describe techniques to improve visibility of fluoroscopic image	Yes / No
7. Able to describe techniques used to reduce patient radiation exposure	Yes / No
8. Able to describe techniques used to reduce operator radiation exposure	Yes / No
9. Able to describe special precautions in case of suspected or known pregnancy <input type="checkbox"/> Patients <input type="checkbox"/> Health care providers	Yes / No
10. Able to describe basic operation procedures	Yes / No

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE PASS FAIL **SCORE** _____/100

This page intentionally left blank.

INFORMED CONSENT 10-Point CHECKLIST*

Student _____ Training Year _____

Faculty _____ Date _____

Simulation Bronchoscopy Workshop Patient-based Bronchoscopy Scenario

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
1. Able to define “Informed Consent”: <input type="checkbox"/> Informed decision-making regarding indications and expected outcomes, conflict of interest <input type="checkbox"/> Protection from liability <input type="checkbox"/> Provides opportunity to assess management strategies <input type="checkbox"/> Provides opportunity to discuss risks, benefits, and alternatives	Yes / No
1. Able to discuss diagnosis and pertinent clinical issues	Yes / No
2. Able to describe the purpose of the procedure	Yes / No
3. Able to describe the nature of the procedure	Yes / No
4. Able to describe procedure-related risks	Yes / No
5. Able to describe procedure-related benefits	Yes / No
7. Able to describe alternative procedures regardless of cost or health care coverage	Yes / No
8. Able to describe potential risks and benefits from choosing the alternatives	Yes / No
9. Able to describe the risks and benefits of not performing the procedure or not choosing any of the alternatives	Yes / No
10. Able to demonstrate “effectiveness” of the informed consent process by asking the patient to explain in his or her own words, their understanding of the procedure	Yes / No

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE PASS FAIL **SCORE** _____/100

This page intentionally left blank.

PROCEDURAL PAUSE 10-Point CHECKLIST*

Student _____ Training Year _____

Faculty _____ Date _____

 Simulation Bronchoscopy Workshop Patient-based Bronchoscopy Scenario

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
1. Able to define "Procedural Pause" as: <input type="checkbox"/> Time-Out <input type="checkbox"/> Wrong patient, site, procedure <input type="checkbox"/> Team communication/patient understanding <input type="checkbox"/> Mandatory in USA	Yes / No
4. Able to describe requirements of the procedural pause: <input type="checkbox"/> Immediately before procedure <input type="checkbox"/> Correct site, position, procedure <input type="checkbox"/> Correct patient <input type="checkbox"/> Pertinent medical records and equipment <input type="checkbox"/> Verbal acknowledgements by all team members <input type="checkbox"/> Elimination of environmental distractions	Yes / No
5. Able to describe the team leader's role	Yes / No
6. Able to describe the nursing team's role	Yes / No
7. Able to describe the patient's role	Yes / No
8. Able to describe other person's roles (technicians, other physicians)	Yes / No
7. Able to list the elements that must be covered: <input type="checkbox"/> Patient <input type="checkbox"/> Procedure <input type="checkbox"/> Side and site <input type="checkbox"/> Informed consent <input type="checkbox"/> Medical records and equipment <input type="checkbox"/> Medications <input type="checkbox"/> Allergies/drug reactions <input type="checkbox"/> Safety concerns based on history	Yes / No
8. Able to address behaviors in case of distractions	Yes / No
9. Able to describe behaviors in case of disagreements	Yes / No
10. Able to describe other elements pertaining to assuring a culture of safety: <input type="checkbox"/> Communication <input type="checkbox"/> Ability to prevent and respond to complications <input type="checkbox"/> Universal, Droplet, and Airborne pathogen precautions	Yes / No

Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE PASS FAIL **SCORE** _____/100

This page intentionally left blank.

PRACTICAL APPROACH 10 Point CHECKLIST*

Student _____ Training Year _____

Faculty _____ Date _____

 Instructor-learner 30 minute session Daily rounds & bronchoscopy consultation

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
1. Initial evaluation A <input type="checkbox"/> Physical examination, laboratory tests, and functional assessment <input type="checkbox"/> Comorbidities	Yes / No
2. Initial evaluation B <input type="checkbox"/> Support system <input type="checkbox"/> Preferences and expectations	Yes / No
3. Procedural strategies A <input type="checkbox"/> Indications, contraindications, expected results <input type="checkbox"/> Operator and team experience and expertise	Yes / No
4. Procedural strategies B <input type="checkbox"/> Risk-benefits and therapeutic alternatives <input type="checkbox"/> Informed consent	Yes / No
5. Techniques and results A <input type="checkbox"/> Anesthesia and perioperative care <input type="checkbox"/> Techniques and instruments	Yes / No
6. Techniques and results B <input type="checkbox"/> Anatomic dangers and other risks <input type="checkbox"/> Results and complications	Yes / No
7. Long-term management plan A <input type="checkbox"/> Outcome assessment <input type="checkbox"/> Follow-up tests and procedures	Yes / No
8. Long-term management plan B <input type="checkbox"/> Referrals to other specialists <input type="checkbox"/> Quality improvement and team evaluation	Yes / No
9. Able to answer case-specific questions <input type="checkbox"/> Question 1 <input type="checkbox"/> Question 2 <input type="checkbox"/> Question 3	Yes / No
10. General ability to provide evidence for and rationally justify decision making <input type="checkbox"/> Subjective assessment of learner ability	Yes / No

*These 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE PASS FAIL **SCORE** _____/100

This page intentionally left blank.

PROCTORED FLEXIBLE BRONCHOSCOPY 10-Point CHECKLIST*

Student _____ Training Year _____

Faculty _____ Date _____

 Simulation Bronchoscopy Workshop Patient-based Bronchoscopy Scenario

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
1. Formulation of effective plan and strategy: <input type="checkbox"/> Informed consent obtained, signed and in medical record <input type="checkbox"/> History and physical <input type="checkbox"/> Review imaging studies <input type="checkbox"/> Cost-effective practice <input type="checkbox"/> Use of information resources <input type="checkbox"/> Applies evidence-based medicine <input type="checkbox"/> Use of systems resources	Yes / No
2. Patient safety: <input type="checkbox"/> ASA assessment <input type="checkbox"/> Airway assessment <input type="checkbox"/> Allergies <input type="checkbox"/> Medications <input type="checkbox"/> Comorbidities	Yes / No
3. Patient safety: <input type="checkbox"/> Positioning <input type="checkbox"/> Supplemental oxygen <input type="checkbox"/> Vital signs <input type="checkbox"/> Suction <input type="checkbox"/> Bite-block and/or ET tube if applicable <input type="checkbox"/> Verifies ability to respond to complications and accessibility of resuscitation equipment	Yes / No
4. Patient and procedural team safety: <input type="checkbox"/> Protection from radiation/lead shielding; badge use <input type="checkbox"/> Eye protection <input type="checkbox"/> Knowledgeable use of fluoroscopy <input type="checkbox"/> Hand disinfection <input type="checkbox"/> Universal precautions <input type="checkbox"/> "Time-Out".	Yes / No
5. Procedure: <input type="checkbox"/> Premedication <input type="checkbox"/> Moderate sedation <input type="checkbox"/> Topical anesthetic	Yes / No
6. Procedure: <input type="checkbox"/> Scope insertion <input type="checkbox"/> Topical anesthetic <input type="checkbox"/> Passage through vocal cords <input type="checkbox"/> Empathy and communication with patient	Yes / No
7. Procedure: <input type="checkbox"/> Inspection of tracheobronchial tree <input type="checkbox"/> Identification of abnormalities <input type="checkbox"/> Atraumatic removal of bronchoscope	Yes / No
8. Procedure: <input type="checkbox"/> BAL <input type="checkbox"/> Mucosal biopsy <input type="checkbox"/> Lung biopsy <input type="checkbox"/> Brush <input type="checkbox"/> TBNA <input type="checkbox"/> EBUS	Yes / No
9. Communication with staff, patient, and patient family <input type="checkbox"/> Puts needs of patient first <input type="checkbox"/> Punctuality <input type="checkbox"/> Respect <input type="checkbox"/> Listening skills <input type="checkbox"/> Personal appearance <input type="checkbox"/> Initiative & Motivation <input type="checkbox"/> Empathy <input type="checkbox"/> Honesty <input type="checkbox"/> Accepts responsibility	Yes / No
10. Documentation/procedure note <input type="checkbox"/> Informative <input type="checkbox"/> Accurate <input type="checkbox"/> Communication with colleagues	Yes / No

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE **PASS** **FAIL** **SCORE** _____/100

This page intentionally left blank.

Introduction to Flexible Bronchoscopy Competency Program Completion Checklist

Educational Item	Completed Yes/No	Assessment Item	Pass/Fail/Incomplete
1. Participation in regional introductory course if available*	Yes / No	Post-test scores Target 12/20 (60% correct) Score _____%	Pass / Fail / Incomplete
2. Mandatory reading: <i>Web-based Essential Bronchoscopist</i>	Yes / No	Post-test scores Target 7/10 (70% correct)	Pass / Fail / Incomplete
• Module 1	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 2	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 3	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 4	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 5	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 6	Yes / No	Score _____	Pass / Fail / Incomplete
Sedation Module	Yes / No	Score _____	Pass / Fail / Incomplete
Fluoroscopy Module	Yes / No	Score _____	Pass / Fail / Incomplete
3. Informed consent, patient safety, and procedural pause simulation workshop	Yes / No	10-pt Checklists Target 100% Score _____%	Pass / Fail / Incomplete Use informed consent and procedural pause checklists
4. Informed consent, patient safety, and procedural pause patient-based scenario	Yes / No	10-pt Checklists Target 100% Score _____%	Pass / Fail / Incomplete Use informed consent and procedural pause checklists
5. Practical Approach interactive workshop	Yes / No	Subjective scores Target Pass	Pass / Fail / Incomplete Use practical approach checklist
6. Flexible bronchoscopy simulation workshop	Yes / No	Target scores 100% BSTAT _____% TBLB/TBNA _____%	Pass / Fail / Incomplete Use BSAT for feedback
7. Flexible bronchoscopy patient-based scenario	Yes / No	Target scores 100% BSTAT _____% TBLB/TBNA _____%	Pass / Fail / Incomplete Use BSAT for feedback
8. Proctored case bronchoscopy checklist	Yes / No	FB 10-pt Checklist Target 100% Score _____%	Pass / Fail / Incomplete

* Currently available in numerous regions and countries.

This page intentionally left blank.

User Instructions

Checklists

- Moderate sedation
- Fluoroscopy
- Informed consent
- Procedural pause
- Practical approach
- Proctored bronchoscopy
- Program completion

This page intentionally left blank.

Scoring Recommendations for CHECKLISTS

(Informed Consent, Procedural Pause, Fluoroscopy, Moderate Sedation, Patient Safety, Proctored Bronchoscopy,)

The goal of these checklists is to be able to monitor a student's progress along the learning curve from *novice* (Score < 60) to *advanced beginner* (Score 60-79), *intermediate* (score 80-99), and *competent* (score 100). The instructor should be able to ascertain, by observing the student's performance that each of the TEN elements in each tool are covered satisfactorily. The frequency with which these tools should be used remains to be studied and is currently at the discretion of program directors.

Repeated testing will demonstrate knowledge and skill acquisition as the student climbs the learning curve from novice to advanced beginner, intermediate and competent bronchoscopist for the procedure being assessed.

To maximize objective scoring, each task in the checklists has been defined explicitly in this user manual. Participation in specially-designed *Train-the-Trainers* courses being currently organized is encouraged to assist with standardization, and to help instructors use this program to its fullest potential.

Scores can be plotted on a graph, and each institution/program can obviously choose its own cut-offs for a PASS grade, although we recommend that a final PASS grade be achieved with a score of 100, in order for the student to be judged competent to perform bronchoscopy independently.

In the absence of a large pilot study demonstrating standard normograms as is done for high-stakes testing, consensus of world renowned experts was obtained to delineate cut-off scores for the following four categories.

Category	Score
Novice	< 60
Advanced Beginner	60-79
Intermediate	80-99
Competent	100

Specific instructions marked by an asterisk (*) are provided in each of the following checklists.

This page intentionally left blank.

User Instructions

Moderate Sedation Checklist

Questions pertaining to sedation can be asked during a separate simulation session or during a patient encounter. The learner will have received the sedation synopsis as well as any institution-specific guidelines and protocols. A passing score of 100, although somewhat subjective, is encouraged.

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
6. Definitions <input type="checkbox"/> Moderate sedation <input type="checkbox"/> Deep sedation	Yes / No
2. Able to obtain moderate sedation informed consent	Yes / No
7. Able to describe ASA classification <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	Yes / No
3. Able to identify high risk patients	Yes / No
4. Able to describe potential contraindications	Yes / No
5. Able to list equipment that must be available	Yes / No
6. Sedation agents: role, dosage, precautions <input type="checkbox"/> Midazolam <input type="checkbox"/> Fentanyl	Yes / No
7. Reversal agents: role, dosage, precautions <input type="checkbox"/> Flumazenil <input type="checkbox"/> Naloxone	Yes / No
8. Able to describe how to respond to complications such as <input type="checkbox"/> Vomiting <input type="checkbox"/> Seizure	Yes / No
9. Able to describe how to respond to over-sedation and <input type="checkbox"/> Hypotension <input type="checkbox"/> Airway obstruction	Yes / No
10. Able to describe how to respond to over-sedation and <input type="checkbox"/> Hypoxemia <input type="checkbox"/> Respiratory failure	Yes / No

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE

PASS

FAIL

SCORE _____/100

User Instructions

Fluoroscopy Checklist

Questions pertaining to fluoroscopy can be asked during a separate simulation session or during a patient encounter. The learner will have received the fluoroscopy synopsis as well as any institution-specific guidelines and protocols. A passing score of 100, although somewhat subjective, is encouraged.

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
1. Able to list indications for using fluoroscopy	Yes / No
2. Able to describe the relevance of voltage and amperage <input type="checkbox"/> For image quality <input type="checkbox"/> For patient safety	Yes / No
3. Able to describe consequences of resolution, distortion, and lag <input type="checkbox"/> For image quality <input type="checkbox"/> For patient safety	Yes / No
4. Able to describe consequences of brightness and contrast <input type="checkbox"/> For image quality <input type="checkbox"/> For patient safety	Yes / No
5. Able to describe dangers of scattered radiation	Yes / No
6. Able to describe techniques to improve visibility of fluoroscopic image	Yes / No
7. Able to describe techniques used to reduce patient radiation exposure	Yes / No
8. Able to describe techniques used to reduce operator radiation exposure	Yes / No
9. Able to describe special precautions in case of suspected or known pregnancy <input type="checkbox"/> Patients <input type="checkbox"/> Health care providers	Yes / No
10. Able to describe basic operation procedures	Yes / No

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE PASS FAIL **SCORE** _____/100

User Instructions

Informed consent Checklist

Educational Item*
Items 1-10 are scored 10 points each (no partial points given)
<p>8. Able to define “Informed Consent”</p> <p><input type="checkbox"/> Informed decision-making regarding indications and expected outcomes, conflict of interest <input type="checkbox"/> Protection from liability <input type="checkbox"/> Provides opportunity to assess management strategies <input type="checkbox"/> Provides opportunity to discuss risks, benefits, and alternatives</p> <p>* The instructor may wish that the student be able to address some of the history of informed consent, and explain how and why informed consent plays a prominent role in medicine today.</p>
<p>2. Able to discuss diagnosis and pertinent clinical issues</p> <p>* Which diagnostic elements and clinical information help guide a patient’s choice of procedures? Why is this particular procedure being performed based on diagnosis and clinical issues? This provides the background to the informed consent process and opens the door for a dialogue with the patient so that the patient understands that simple authorization to perform the procedures is not what is being requested.</p>
<p>3. Able to describe the purpose of the procedure</p> <p>* Based on the clinical picture, the procedure is placed into context and the different elements of the procedure (such as to obtain lung tissue, or to obtain lung secretions to look at under the microscope in order to detect infection) are described.</p>
<p>4. Able to describe the nature of the procedure</p> <p>* The procedure is described in layman’s terms.</p>
<p>5. Able to describe procedure-related risks</p> <p>*Risks applicable to the procedure are noted; the student may offer a few questions and answers, such as when can the patient eat, will the procedure hurt, is there a chance for bleeding or lung collapse. Some patients may fear death, and so this also may need to be addressed. A description of risks can increase both state and trait anxiety, and therefore, patients should probably be asked about their anxiety level and whether medication or other interventions (music, hand-holding, family members present at bedside, etc) are desired.</p>
<p>6. Able to describe procedure-related benefits</p> <p>*Benefits should be described clearly, such as early diagnosis leads to early treatment, may avoid need for more invasive tests, ability to remove patients from isolation, provide information to other doctors to assist with therapeutic and diagnostic strategies, certain illnesses might be excluded so as to simplify further work-up.</p>
<p>7. Able to describe alternative procedures regardless of cost or health care coverage</p>

<p>* Alternatives to bronchoscopy should be cited and described; these might include, for example, invasive procedures such as open surgery, mediastinoscopy, percutaneous needle aspiration, and noninvasive procedures such as radiographic studies, etc.</p>
<p>8. Able to describe potential risks and benefits from choosing the alternatives * The risks and benefits from each of the alternatives should be addressed and explained. They can be compared to those of bronchoscopy, and the physician can provide expert opinion as to why bronchoscopy is being proposed and recommended.</p>
<p>9. Able to describe the risks and benefits of not performing the procedure or not choosing any of the alternatives * If bronchoscopy is not performed, the patient should be told about potential consequences, whether or not alternatives are chosen, such as, for example, delayed diagnosis, prolonged illness, endangerment, need for different modes of surveillance or subsequent diagnostic tests or therapeutic measures.</p>
<p>10. Able to demonstrate “effectiveness” of the informed consent process by asking the patient to explain in his or her own words, their understanding of the procedure * The patient should be asked to describe the bronchoscopy and its consequences in general terms. This also provides an opportunity for dialogue.</p>

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE **PASS** **FAIL** **SCORE** _____/100

User Instructions

Procedural Pause Checklist

<p>1. Able to define “Procedural Pause” as</p> <p><input type="checkbox"/> Time Out <input type="checkbox"/> Wrong patient, site, procedure <input type="checkbox"/> Team communication/patient understanding <input type="checkbox"/> Mandatory in USA</p>
<p>9. Able to describe requirements of the procedural pause</p> <p><input type="checkbox"/> Immediately before procedure <input type="checkbox"/> Correct site, position, procedure <input type="checkbox"/> Correct patient <input type="checkbox"/> Pertinent medical records and equipment <input type="checkbox"/> Verbal acknowledgements by all team members <input type="checkbox"/> Elimination of environmental distractions</p>
<p>3. Able to describe the team leader’s role</p> <p>* Mark the site if applicable, state name, patient, and procedure being performed, lead the time out, assure that all distractions are avoided during the time, requests a new time-out in case distractions occur, assures that time-out is being done according to protocol, addresses discrepancies, cancels procedure if all elements are not ascertained, modifies procedural strategy if applicable according to results of the time out.</p>
<p>4. Able to describe the nursing team’s role</p> <p>* Assures patient identification using at least two independent identifiers, assures right side right patient, right procedure, reviews and reads informed consent, assures appropriate medical records and equipment are available, assures appropriate response to complications or adverse events is possible.</p>
<p>5. Able to describe the patient’s role</p> <p>*If alert, able to state name, agree with procedure and site, signal family members who might be present.</p>
<p>6. Able to describe other person’s roles (technicians other physicians)</p> <p>* Able to state name and role.</p>
<p>7. Able to list the elements that must be covered</p> <p><input type="checkbox"/> Patient <input type="checkbox"/> Procedure <input type="checkbox"/> Side and site <input type="checkbox"/> Informed consent <input type="checkbox"/> Medical records and equipment <input type="checkbox"/> Medications <input type="checkbox"/> Allergies/drug reactions <input type="checkbox"/> Safety concerns based on history</p>
<p>8. Able to address behaviors in case of distractions</p> <p>*No one should enter or leave the room during the time-out; any interruptions should prompt renewing the time-out; if a new or second procedure is being performed, time-out should be repeated; individuals should remain silent so that all present can focus on the time-out being performed.</p>

<p>9. Able to describe behaviors in case of disagreements * Verbal comments, behavior modification during or after the time-out; anyone should be able to disagree with what is being said during the time-out if it is inconsistent with the informed consent, predesignated procedural strategy, or clinical suspicions.</p>
<p>10. Able to describe other elements pertaining to assuring a culture of safety <input type="checkbox"/> Communication <input type="checkbox"/> Ability to prevent and respond to complications <input type="checkbox"/> Universal, Droplet, and Airborne pathogen precautions *It is understood that differences between institutions and countries exist. Guidelines specific to each institution or country of practice can be given to students. General rules and concepts, however, should be understood and are covered in the simulation session.</p>

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE **PASS** **FAIL** **SCORE** _____/100

User Instructions

Practical Approach Checklist

This practical approach exercise is held as a 30-minute session between learner and instructor, similar to an “oral examination”. Of course, programs including Practical Approach-like discussions for each bronchoscopy consultation may choose to forego a formal session. Using a structured format (the four boxes), learners and instructors are more certain to cover in as great a depth as desired all aspects of a procedure: strategy and planning, techniques and instruments, and response to complications. Because each element is important, items are equally weighted at ten points each with no partial points given. A passing score of 100, although somewhat subjective, is encouraged.

Educational Item* Items 1-10 are scored 10 points each (no partial points given)	Satisfactory Yes/No
2. Initial evaluation A <input type="checkbox"/> Physical examination, laboratory tests, and functional assessment <input type="checkbox"/> Comorbidities	Yes / No
2. Initial evaluation B <input type="checkbox"/> Support system <input type="checkbox"/> Preferences and expectations	Yes / No
3. Procedural strategies A <input type="checkbox"/> Indications, contraindications, expected results <input type="checkbox"/> Operator and team experience and expertise	Yes / No
4. Procedural strategies B <input type="checkbox"/> Risk-benefits and therapeutic alternatives <input type="checkbox"/> Informed consent	Yes / No
5. Techniques and results A <input type="checkbox"/> Anesthesia and perioperative care <input type="checkbox"/> Techniques and instruments	Yes / No
6. Techniques and results B <input type="checkbox"/> Anatomic dangers and other risks <input type="checkbox"/> Results and complications	Yes / No
7. Long-term management plan A <input type="checkbox"/> Outcome assessment <input type="checkbox"/> Follow-up tests and procedures	Yes / No
8. Long-term management plan B <input type="checkbox"/> Referrals to other specialists <input type="checkbox"/> Quality improvement and team evaluation	Yes / No
9. Able to answer case-specific questions <input type="checkbox"/> Question 1 <input type="checkbox"/> Question 2 <input type="checkbox"/> Question 3	Yes / No
10. General ability to provide evidence for and rationally justify decision making <input type="checkbox"/> Subjective assessment of learner ability	Yes / No

*These 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE **PASS** **FAIL** **SCORE** _____/100

This page intentionally left blank.

User Instructions

Proctored Flexible Bronchoscopy Checklist

Educational Item*
Items 1-10 each scored 10 points (no partial points given)
<p>1. Formulation of effective plan and strategy</p> <p><input type="checkbox"/> Informed consent obtained, signed and in medical record</p> <p><input type="checkbox"/> History and physical <input type="checkbox"/> Review imaging studies <input type="checkbox"/> Cost-effective practice <input type="checkbox"/> Use of information resources <input type="checkbox"/> Applies evidence-based medicine</p> <p><input type="checkbox"/> Use of systems resources</p> <p>* The instructor should be certain that the student has obtained the informed consent and that it is signed and in the chart. The student should be able to describe pertinent clinical and radiographic findings and to use evidence-based medicine in addition to any other information gained from other resources, such as faculty expert opinion, advice, and requests by referring physicians, to justify the procedure being performed. The student should be able to describe the use of institutional resources, and use them according to institutional practices, such as fluoroscopy, ultrasound, computed tomography, electrocautery and other instruments and equipment. This also includes nursing surveillance, respiratory therapy assistance, need for procedure suite, operating theater or intensive care unit. Cost-effectiveness can be discussed in regards to other diagnostic or therapeutic modalities, but also how bronchoscopy may or may not increase or decrease health-related expenditures in the context of the patient's diagnosis and treatment plan.</p>
<p>2. Patient safety:</p> <p><input type="checkbox"/> ASA assessment <input type="checkbox"/> Airway assessment <input type="checkbox"/> Allergies <input type="checkbox"/> Medications</p> <p><input type="checkbox"/> Comorbidities</p> <p>*ASA and Airway assessments should be performed according to the institution's guidelines. Allergies, medications, especially anticoagulants and antiplatelet agents should be noted, Comorbidities that might increase the risk of adverse events should also be described and identified.</p>
<p>3. Patient safety:</p> <p><input type="checkbox"/> Positioning <input type="checkbox"/> Supplemental oxygen <input type="checkbox"/> Vital signs <input type="checkbox"/> Suction <input type="checkbox"/> Bite-block and/or ET tube if applicable <input type="checkbox"/> Verifies ability to respond to complications and accessibility of resuscitation equipment</p> <p>*These measures should be taken according to institutional biases and protocols.</p>
<p>4. Patient and procedural team safety:</p> <p><input type="checkbox"/> Protection from radiation/lead shielding, badge use <input type="checkbox"/> Eye protection</p> <p><input type="checkbox"/> Knowledgeable use of fluoroscopy <input type="checkbox"/> Hand disinfection <input type="checkbox"/> Universal precautions</p> <p><input type="checkbox"/> "Time-Out".</p> <p>*Students should be observed as they comply with these safety measures. Additional information pertaining to time-out, universal precautions, and knowledge of fluoroscopy are provided in the modules. Protocols may vary among institutions.</p>
<p>5. Procedure:</p> <p><input type="checkbox"/> Premedication <input type="checkbox"/> Moderate sedation <input type="checkbox"/> Topical anesthetic</p>

<p>*These should be administered according to institutional biases and according to protocols.</p>
<p>6. Procedure: <input type="checkbox"/> Scope insertion <input type="checkbox"/> Topical anesthetic <input type="checkbox"/> Passage through vocal cords <input type="checkbox"/> Empathy and communication with patient *Done according to institutional practices. Empathy and communication with the patient should be observed. Students should be able to speak comfortably and reassuringly with their patient. Open dialogues should be encouraged to enhance confidence and decrease patient anxiety.</p>
<p>7. Procedure: <input type="checkbox"/> Inspection of tracheobronchial tree <input type="checkbox"/> Identification of abnormalities <input type="checkbox"/> Atraumatic removal of bronchoscope *Performed according to institutional practices.</p>
<p>8. Procedure: <input type="checkbox"/> BAL <input type="checkbox"/> Mucosal biopsy <input type="checkbox"/> Lung biopsy <input type="checkbox"/> Brush <input type="checkbox"/> TBNA <input type="checkbox"/> EBUS *Performed according to institutional practices. It is recognized that not all patients will undergo all of these procedures, therefore, if the institution desires, a different proctored checklist can be completed for each (or each set) of the procedures listed.</p>
<p>9. Communication with staff, patient, and patient family <input type="checkbox"/> Puts needs of patient first <input type="checkbox"/> Punctuality <input type="checkbox"/> Respect <input type="checkbox"/> Listening skills <input type="checkbox"/> Personal appearance <input type="checkbox"/> Initiative & Motivation <input type="checkbox"/> Empathy <input type="checkbox"/> Honesty <input type="checkbox"/> Accepts responsibility *These are for the most part subjective assessments, and also require feedback from nursing staff. Students should be told that they will be judged on these items during the course of their training, so that they can obtain feedback from their instructors and improve their performance in these areas.</p>
<p>10. Documentation/procedure note <input type="checkbox"/> Informative <input type="checkbox"/> Accurate <input type="checkbox"/> Communication with colleagues *Procedure notes may vary according to institution; however, in general, the note should be informative, telling a story about the procedure that referring physicians can understand. The note should be accurate regarding what was done, why it was done, and how it was done. Procedure-related adverse events should be described. Communication with colleagues should be observed, by watching how the student interacts with the nursing team, other physicians, and with referring physicians. While this element is also, for the most part subjective, in general, communication should be informative, accurate polite, and considerate.</p>

* Each of the 10 items contains all of the elements required by ACGME (patient care, medical knowledge, practice-based learning and improvement, interpersonal communication skills, professionalism, and systems-based practice).

FINAL GRADE **PASS** **FAIL** **SCORE** _____/100

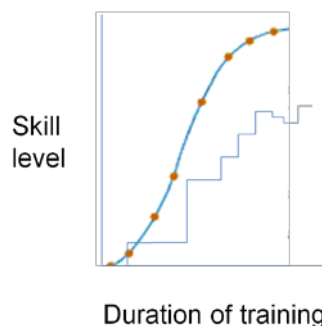
Users instructions for the Bronchoscopy Competency Program Completion Checklist

This checklist contains all of the elements comprised in the Introduction to Flexible Bronchoscopy curriculum. The purpose of this curriculum is to help learners climb the learning curve from novice and advanced beginner to intermediate and then competent bronchoscopist, able to perform flexible bronchoscopy independently.

Not all learners will progress at the same speed¹. It is thus assumed that learners may become competent at certain procedures before they become competent in others. The frequency with which the checklists (and assessments tools) pertaining to the individual components of the curriculum need be administered has not yet been ascertained. Participation in specially-designed *Train-the-Trainers* courses is encouraged to assist with uniformization and to help instructors use this program to its fullest potential.

This curriculum assures that learners complete certain materials to the satisfaction of their instructors. It is understood that some learners may need to repeat certain elements of the curriculum until they obtain a passing grade. Some institutions may wish for their trainees to repeat parts of the curriculum during the course of their training (yearly for example, or during the months prior to completing their training).

A PASS grade signifies that satisfactory (passing) score in each of the elements contained in the curriculum. The overall number of procedures performed by the learner should also be recorded; it is recommended that learners keep a diary-log of their procedures, and that program directors and bronchoscopy educators conduct feedback sessions with learners to monitor patient-care related outcomes.



¹ German psychologist Hermann Ebbinghaus (1850-1909) is credited with originally describing the learning curve in his work on memory (see RH Wozniak. Introduction to Memory. Classics in psychology 1855-1914: Historical essays. Bristol UK, Thoemmes Press, 1999). Learning curves can be mathematically calculated and may have different shapes representing incremental change, including a series of plateaus, rises and dips, and the traditional ogive “S” shaped curve.

Introduction to Flexible Bronchoscopy Competency Program Completion Checklist

Educational Item	Completed Yes/No	Assessment Item	Pass/Fail/Incomplete
1. Participation in regional introductory course if available*	Yes / No	Post-test scores Target 12/20 (60% correct) Score _____%	Pass / Fail / Incomplete
2. Mandatory reading: <i>Web-based Essential Bronchoscopist</i>	Yes / No	Post-test scores Target 7/10 (70% correct)	Pass / Fail / Incomplete
• Module 1	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 2	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 3	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 4	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 5	Yes / No	Score _____	Pass / Fail / Incomplete
• Module 6	Yes / No	Score _____	Pass / Fail / Incomplete
Sedation Module	Yes / No	Score _____	Pass / Fail / Incomplete
Fluoroscopy Module	Yes / No	Score _____	Pass / Fail / Incomplete
3. Informed consent, patient safety, and procedural pause simulation workshop	Yes / No	10-pt Checklists Target 100% Score _____%	Pass / Fail / Incomplete Use informed consent and procedural pause checklists
4. Informed consent, patient safety, and procedural pause patient-based scenario	Yes / No	10-pt Checklists Target 100% Score _____%	Pass / Fail / Incomplete Use informed consent and procedural pause checklists
5. Practical Approach interactive workshop	Yes / No	Subjective scores Target Pass	Pass / Fail / Incomplete Use practical approach checklist
6. Flexible bronchoscopy simulation workshop	Yes / No	Target scores 100% BSTAT _____% TBLB/TBNA _____%	Pass / Fail / Incomplete Use BSAT for feedback
7. Flexible bronchoscopy patient-based scenario	Yes / No	Target scores 100% BSTAT _____% TBLB/TBNA _____%	Pass / Fail / Incomplete Use BSAT for feedback
8. Proctored case bronchoscopy checklist	Yes / No	FB 10-pt Checklist Target 100% Score _____%	Pass / Fail / Incomplete

* Currently available in numerous regions and countries.

This page intentionally left blank.

This page intentionally left blank.