



\* indicates a mandatory response

## Respirology Thoracentesis Assessment Tool

**This Thoracentesis Assessment Form provides complimentary information to existing procedural EPAs**

### Scale:

- 1- "I had to take over"
- 2- "I had to talk the trainee through"
- 3- "I had to prompt the trainee from time to time"
- 4 -"I needed to be in the room just in case"
- 5- "I did not need to be there"

The purpose of this scale is to evaluate the trainee's ability to perform all activities related to thoracentesis safely and independently. The scores provided should reflect the trainee's ability to competently perform tasks relevant to thoracentesis and not be based on expectations related to level of training.

If an item was not assessed because the supervisor had previously assumed control, "1" should be selected.

### \*Relative complexity of procedure:

- Low
- Medium
- High

### Pre-Procedure Planning

	1	2	3	4	5
	I had to take over	I had to talk the trainee through	I had to prompt the trainee from time to time	I needed to be in the room just in case	I did not need to be there
*1. Performs appropriate pre-procedure evaluation of the patient, including review of recent imaging, medications, labs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*2. Communicates the plan to the patient and obtains informed consent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Technical

	1	2	3	4	5
	I had to take over	I had to talk the trainee through	I had to prompt the trainee from time to time	I needed to be in the room just in case	I did not need to be there
*1. Ensures all required supplies for the procedure are available and patient is appropriately monitored (O2 saturation, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*2. Optimizes ultrasound imaging by positioning the patient appropriately, selecting the appropriate probe, and adjusting gain and depth settings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*3. Identifies key structures including: diaphragm, liver (R), spleen (L), normal lung, atelectatic lung and pleural fluid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*4. Is able to characterize the effusion based on US characteristics: ie: free/loculated/complex/septated/small/medium/large	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*5. Maintains sterile technique throughout the procedure.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	1	2	3	4	5
	I had to take over	I had to talk the trainee through	I had to prompt the trainee from time to time	I needed to be in the room just in case	I did not need to be there
*6. Choses a safe puncture site characterized by 1) located on top of a rib; 2) as lateral as possible; 3) as low as possible with at least one interspace above the diaphragm; 4) with no lung or "curtain sign" 5) with an interpleural distance of at least 10-15mm	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*7. Correctly positions and directs the needle/catheter to obtain samples and /or to provide drainage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*8. Maintains patient comfort throughout the procedure by providing positioning aids, adequate anesthesia and verbal reassurance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*9. Performs the procedure efficiently with an ergonomic set up of equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Post Procedure

	1	2	3	4	5
	I had to take over	I had to talk the trainee through	I had to prompt the trainee from time to time	I needed to be in the room just in case	I did not need to be there
*1. Ensures appropriate disposal of equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*2. Ensures appropriate processing of samples (labels, samples, requisitions)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*3. Assesses for and manages post procedure complications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*4. Documents procedure appropriately	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**\*Overall on this task did the trainee demonstrate competency to perform this procedure independently?**

- Yes  
 No

**\*Suggestions for Improvement:**

**The following will be displayed on forms where feedback is enabled...**

*(for the evaluator to answer...)*

\*Did you have an opportunity to meet with this trainee to discuss their performance?

- Yes  
 No

*(for the evaluatee to answer...)*

\*Did you have an opportunity to discuss your performance with your preceptor/supervisor?

- Yes  
 No