

Functional Issues to Address - Checklist

Who, When, Where, What, and How

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- When will the Surgery Scheduled be Completed?
- How and When will Surgical Case Cart Requisitions be prepared?
- **What types of materials** will be picked by CS, what will be left for OR?
- **When** will Case Carts be prepared?
- **Where** will Case Carts be staged prior to Surgery?
- **How will carts be transported** between CS and OR?
- How will the Case Cart be used **during the procedure**? [i.e. dormant, supply transport]
- How will supplies that must be available, but are not used, be handled? [i.e. restocked]
- How will soiled instruments be transported for reprocessing after the procedure?
- Will instrument sets be 'counted' and 're-set' prior to decontamination?
- How will soiled instruments and utensils be transported from the OR, and to where?
- How will soiled linens and trash be transported from the OR, and to where?
- How will **supplies and instruments not used** be transported from the OR, and to where?
- What types of items are required to be stocked as back-up in OR?
- How will the back-up supplies in OR be restocked?
- How will emergency and add-on cases be handled? [i.e. supplies staged in OR]
- What is the mechanism for the OR to communicate 'stat' requests to CS?
- What is the mechanism for CS respond to 'stat' requests?
- How will supply charging occur?
- **How many times are each Category of Supply handled when 'used' and when 'not used'?**