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> [Table of Contents](#) > [Volume 1](#) > [Section 1 - Principles of Musculoskeletal Surgery and Medicine](#) > [Chapter 9 - Preoperative Planning and Perioperative Management](#) > [RATIONALE FOR PREOPERATIVE PLANNING](#)

Search:  [Current Book](#) [All Books](#)  [Check Spelling](#)

- RATIONALE FOR PREOPERATIVE PLANNING
- [+] TECHNIQUES FOR CREATING PREOPERATIVE DRAWINGS
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- COMPUTERIZED PLANNING TECHNIQUES
- PATIENT SAFETY
- INTRAOPERATIVE SURGICAL MANAGEMENT
- THE SURGEON'S ATTITUDE AND CONDUCT
- CHOICE OF ANESTHESIA
- PROPHYLACTIC ANTIBIOTICS
- [+] POSITIONING THE PATIENT

[Back](#)

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## Chapter 9

### Preoperative Planning and Perioperative Management

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#### RATIONALE FOR PREOPERATIVE PLANNING

Success of surgery is increasingly being measured by the patient's satisfaction and functional outcome. Not only must the procedure be performed technically well, but also all the associated factors, from preoperative evaluation to postoperative therapy and follow-up, must be efficient and well coordinated. The value of preoperative planning has long been recognized in orthopedic surgery, but it has become increasingly important as the technical complexity of procedures and equipment has expanded.

Preparation of a carefully thought-out preoperative plan offers many advantages for the surgeon, the operating room team, and the patient. Planning provides several benefits for the surgeon, including decreased stress during operative cases that go smoother and faster. The operating room team will be better prepared with all necessary equipment, and is more likely to view the surgeon as a competent and dependable surgeon with whom they enjoy working. The direct benefits of this preparation for the patient are improved outcomes and increased safety.

Preoperative preparation includes careful evaluation of the patient's medical and social situation to minimize the risks of perioperative complications and problems. Preoperative clearance may require consultation with a medical specialist or anesthesiologist. It may be necessary to coordinate autologous blood donations. Additionally, it

P.196

may be necessary to make discharge plans, which could involve home care or transfer to a rehabilitation or skilled nursing facility. Preoperative patient education is on the rise as the frequency and duration of inpatient hospitalization decline. Patient education prepares patient and family for the anticipated surgery and the postoperative recovery period. Patients' understanding of their role in this process is important to a successful outcome.

Increasing demands on their time require surgeons to perform efficiently without sacrificing quality. With preoperative planning, the surgeon thinks through the operation ahead of time, which allows the operation to run more smoothly and quickly and provides important time-management benefits.

Increasing technological complexity demands increased preoperative preparation. For example, there are now a multitude of implants available for surgeons to choose from. Preoperative preparation enables the surgeon to select the optimal implant for a given patient and become familiar with its use, and to be sure that all necessary equipment is available for the procedure. Surgeons who think through the operative procedure in advance can easily alter the sequence of steps to provide the optimal outcome, a luxury not often available in the middle of surgery. Being well prepared includes having backup plans to handle any contingencies that might arise.

Preoperative surgical plans have most commonly been used for complex acute and reconstructive trauma, osteotomies, total joint arthroplasty, and other technically challenging procedures. The benefits of preoperative planning can also be applied to simple and straightforward cases.

Planning should include making both a drawing of the planned procedure and a written series of steps and reminders. Mast et al. have described the "surgical tactic" as an outline of sequential steps used in the operating room that will bring about the desired end result.<sup>1</sup> While a well-thought-out preoperative plan is not a guarantee of success, it may reduce the potential for intraoperative error and allow the operation to proceed smoothly from step to step. It is important to share these plans with the anesthesiologist and operating room staff, so that they will be able to anticipate all the needs of both surgeon and patient.

In setting forth the steps of the operation, advance planning helps ensure that all necessary equipment is requested and available, and that all support personnel have been brought on board. As the steps are planned, the required equipment is listed.

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