Developing a simplified guide for undergraduate nursing consultations
Elaboração de guia simplificado de consulta de Enfermagem na graduação

**ABSTRACT**

**Objective:** to develop a guide to help nursing undergraduates carry out nursing consultations in accordance with the stages of the Nursing Process.

**Method:** This is an experience report, as it involves studies that deal in detail with the description of technological innovation products in this case, the development of educational technologies, with a view to building a simplified NC Guide, organizing the content to make up the theoretical framework and creating a repertoire of images, both of their own authorship and from the literature. The content was organized into the five stages of the Nursing Process and the propaedeutic techniques of the physical examination. Throughout the guide, the steps that must be followed in order to elucidate an assertive nursing diagnosis in the consultation itself were demonstrated.

**Results:** The guideline is called the Nursing Consultation Guide and its final version consists of a cover, title page, and 80 pages, containing a total of 74 illustrations.

**Conclusion:** It is believed that there is a major deficit in the teaching of clinical practices during undergraduate nursing courses. As an effective solution, a sequential physical examination guide in addition to the NP steps can serve as training for students.

**Descriptors:** Nursing; Nursing consultation; Nursing education. Guide. Undergraduate Nursing Programs; Nursing Process.

**RESUMO**

**Objetivo:** elaborar um guia para a consulta de Enfermagem baseado na SAE e no PE, que visa direcionar o aluno a como realizar as etapas da consulta. **Método:** trata-se de uma revisão sistemática de literatura com a finalidade de construir um guia. Foram selecionadas as informações julgadas importantes, sendo realizada a organização do conteúdo para compor o referencial teórico e criado um repertório com imagens, de própria autoria e da literatura. Os conteúdos foram organizados nas cinco etapas do Processo de Enfermagem e nas técnicas propedêuticas de exame físico. Por toda a extensão do guia foram demonstradas as etapas que devem ser seguidas para a elucidação do diagnóstico de Enfermagem assertivo na consulta propriamente dita. **Resultados:** a diretriz é chamada de Guia de Consulta de Enfermagem e sua versão final é composta por capa, folha de rosto e 80 páginas, contendo um total de 74 ilustrações. **Conclusão:** acredita-se que há um grande deficit no ensino de práticas clínicas durante a graduação de Enfermagem. Como solução eficaz, um guia sequencial de exame físico somado às etapas da SAE pode servir de treinamento aos estudantes. **Descritores:** Enfermagem; Consulta de Enfermagem; Educação em Enfermagem. Guia. Programas de Graduação em Enfermagem; Processo de Enfermagem.
INTRODUCTION

Based on the trajectory of Florence Nightingale and her legacy to nursing, she was a pioneer in teaching that nurses should be observant, and systematic and know how to make judgments for care planning. In this context, the nursing consultation (NC) emerges as an activity of exclusive competence of the nurse and must be systematized to identify possible problems and make the appropriate planning, requiring the development of critical sense established in stages, starting from the basic level.

In 1986, Law No. 7,498, registered with the Federal Nursing Council (COFEN), determined that consultation and prescribing nursing care are the exclusive activities of nurses. In 1999, the Federal Nursing Council (COFEN) approved the mandatory implementation of the Systematization of Nursing Care (SNC) in public or private institutions in the state of São Paulo, and the term Nursing Process (NP) was adopted in COFEN Resolution No. 736 of January 17, 2024.

Currently, in order to organize nursing care, the NP tool is used, where the nurse's activities are directed, which are five interrelated, interdependent stages, which are: Nursing Assessment, Nursing Diagnosis, Nursing Planning, Nursing Implementation, and Nursing Evolution, with NC being inserted in the NP, and should be based on theoretical support that directs the professional's practice in each stage. The NP, recognized as the standard of care practice, is a nurse's private activity. It is a method that guides the nurse's critical thinking and clinical judgment, directing the nursing team to care for the person, family, community and care groups under their care. It is a methodological instrument for guiding care and documenting professional practice.

Given the technical nature of both the SNC and the execution of the NP, students are concerned about the clinical practice of nursing, since they do not yet have the ability to make an accurate clinical judgment.

In view of students’ difficulties, consultation guides have emerged as an alternative to provide support and more security. The Nursing Consultation Guide is considered to be a tool designed in a systematized way, with a simple and practical sequence to facilitate the development of activities related to the care of patients attending the health clinic at the Piaget University Centre and other Higher Education Institutions (HEIs).
The need was identified to draw up a simplified guide for the NC based on the NP, directing the student to carry out the stages of the consultation, using practical, didactic, and quickly accessible material, with specific information so that the student can develop the safe technique of assessing the patient in an NC, emphasizing the importance of learning how to solve problems, how to apply the NP, the development of writing and communication skills, both with the patient and with the members of the team, which until now will be made up of other students.²

**OBJECTIVE**

Draw up a guide for NC based on the SNC and the NP, which aims to direct the student on how to carry out the stages of the consultation.

**METHOD**

To analyze the context, in order to respond to the problem specified and achieve the objectives set, an experience report was used because it involves studies that deal in detail with the description of technological innovation products (in the case of the development of educational technologies, with a view to building a simplified NC guide, contemplating the question that permeated around the development of nursing students' skills in performing NC). This review was systematic in nature so that previous research could be summarized and general conclusions drawn in order to analyze the scientific content of the subject in question.⁶

This research followed several basic stages: 1) articulating the research topic; 2) carrying out the literature search; 3) organizing the data collected; 4) interpreting and evaluating the research results; and 5) proposing and disseminating the review.⁷

Given its applicability to the chosen topic, the need was seen to bring together all the information on NC in a guide, so that the student has all the steps for carrying out the NP-guided consultation in a single document.

To build the guide, the study included the following stages:

Stage 1 - Survey and Selection of Content: involved research and consultation of articles and academic papers, as well as theses and periodicals. The sources of information were the arsenal of books in the physical and digital library of the Centro Universitário Piaget - Suzano /São Paulo, and a systematized search in the Regional Portal of the Virtual Health Library (VHL); in publications of the Federal Nursing Council (COFEN), Regional Nursing Council (COREN-SP) and the publications of the Ministry of Health.
Stage 2, see (Figure 1) - was set up for the analysis and organization of all the material, dividing it into parts, and identifying trends and patterns related to the references and the proposed theme.

The VHL Regional Portal allows a scan to be carried out using the search strategy. The descriptors were associated with synonyms under the acronym Descriptors in Health Sciences (DECs), the controlled vocabulary with the search, the following descriptors were found and used: ("Nursing" OR "Nursing in the office" OR "Nursing Consultation") AND ("Teaching" OR "Education" OR "Nursing Education" OR "Nursing Teaching").

Alternative descriptors were selected for the search, as they increase the sensitivity of the search by associating the descriptors with synonyms because there are articles in the database that have not yet been indexed. In the advanced search, 51 articles were found, when associated with the NP stages, the keywords and their descriptors, articles and academic papers, as well as theses and journals. On the other hand, the exclusion criteria were documents relating to congresses, conferences, technical reports, and documentaries.

The information deemed important for use in the creation of the simplified NC guide was selected, and the content was organized to make up the theoretical framework and a repertoire of images was created, both by the author and from the literature, making up the guide. The content was organized into the five stages of NP and the physical assessment techniques.

Stage 3 - consisted of drawing up the simplified guide, in which the NP was described, containing information explaining each stage of the process, including the physical examination, describing each detail of the physical assessment, and directing learning towards the development of the student's critical thinking.
Figure 1 - Representation in a flow diagram format of the bibliographic survey and the selection of content. Suzano-SP, 2023.

The guide will be simplified in order to help students develop critical thinking and can be used by teachers during classes, in lectures, and before students enter the internship fields.
In ethical terms, as this is a study to create a simplified guide for consultation with nurses, it will not be submitted to the Research Ethics Committee for evaluation in accordance with Resolution 466/12 of the National Health Commission, but all ethical rules apply to ensure the legitimacy of the information, in terms of privacy and confidentiality, and the established content will be respected.

RESULTS

A reference guide was drawn up divided into 13 headings: The teaching of clinical practice and the applicability of a simplified NC guide at the undergraduate level; Physical examination; General examination of the head and neck; General examination of the cardiovascular system; General examination of the thorax and respiratory system; General examination of the abdomen and digestive system; General examination of the urinary system; General examination of the breasts and axillae; General examination of the external and internal female genitalia; General examination of the male genitalia; General integumentary examination; General examination of the locomotor system and Vital Signs which give rise to the various sections of the guide. In each section of the guide, only the information necessary for professionals to understand and follow each piece of information is presented; these are written in short sentences and words with simple definitions and analogies to make the information easier to understand. These concepts are presented through sentences and illustrations.

Throughout the educational guide, the steps that must be followed in order to elucidate nursing diagnoses and/or provide assertive guidance during the consultation itself were demonstrated.

To do this, we used illustrations by the authors and copyright-free images available on Google.

The illustrations, layout, and design of the simplified NC guide used in the educational manual were developed by a graphic arts professional and financed by the main authors of the studies. The simplified NC guide has an emphasis on accessibility, with layout, font style and size, images, and colors blended harmoniously to make reading, guidance, and understanding as pleasant and efficient as possible. The editing and layout process is in line with the content, structure/organization, and cultural sensitivity. The authors of the study made the adjustments with the help of a graphic arts professional and the computer graphics program Adobe Illustrator - an image editor.

This guideline is called the Nursing Consultation Simplified Guide, and its final version consists of a cover, title page, and 80 pages, with a standard diameter for all
pages of 297mm high x 210mm wide, with the aim of making it accessible and easy to handle. There are a total of 74 illustrations.

As for writing style and design, Arial font, text size 12, and heading 14 predominated. Bold highlighting was used for titles. Red and green were used predominantly in the guide, as they symbolize the emblem of the Centro Universitário Piaget - Suzano /São Paulo, and the course logo.13

Following the drafting process, the texts were checked for readability and content validity by specialist professors Prof. Lúcia Helena Ferreira Viana and Prof. Débora de Oliveira Cortez, both nurses, and by reviewer Prof. Poliana Andrade Lima.

Source: Elaborated by the authors (2022). Available at: https://drive.google.com/file/d/1Q3XO2Z-EPoPMyKuP1vZl9Ce9cv9SnPv/view?usp=drive_link

Figure 2 - Simplified NC guide with QR Code for quick access. Suzano-SP, 2023.

DISCUSSION

It is understood from the conceptual definition that nursing students are beginning to learn how to incorporate the profession, which includes knowing how to make clinical judgments, develop critical thinking, and know how to make assertive and effective decisions about patients and their families. A student strives to develop critical thinking, but in order to do so, he or she initially relies on manuals, either of procedures of the hospital where he or she will work, or books and articles to guide decision-making. The use of protocols, such as the simplified guide for NC, aims to train students in their practice, to make consultations more dynamic, and to plan the care that will be provided.2,7,13-14
The importance of the research topic can be seen in the growing number of students who, in the teaching-learning process, need to develop skills and abilities to implement a care model that is appropriate to the conditions of the population's health needs during their consultation.

It is thought that the use of a simplified NC guide is necessary and appropriate, as it can provide information in a simple and direct way that improves the knowledge of professionals, especially recent graduates. The educational manual arose from the needs of students/initiates, was developed in scientific terms, and is, therefore, a powerful strategy for gathering information that can support safe practices in the health sector.

A weakness of the study was the disparity in the physical examinations between the authors surveyed. This fact made it necessary to put the literature together in order to compose a simplified physical examination guide, but one that contains the largest and most complete sequence in a single piece of material.

The group's point of view emphasizes the need to search through a wide range of literature in order to effectively compose the guide, although it is available from a wide range of authors.

The results and the literature are in line with each other, with both sharing the same concept and moving in harmony. The difference is that the simplified NC guide focuses on physical examinations of all the body systems.

There is an alignment between the results and the legislation, presented below, with a summary of the main aspects of the legislation relating to the use of a conduct guide/guidelines in health and nursing:  

Law No. 8.080 of September 19, 1990, provides for the preparation of protocols and procedures, among others, by institutions.

Law No. 12.401 of April 28, 2011, which amends Law No. 8.080/1990, in its article 19, item II, adopts the definition of clinical protocol and therapeutic guideline: "a document that establishes the criteria for diagnosing a disease or health problem".

Law No. 7,498, of June 25, 1986, regulates the practice of nursing, and Decree No. 94,406, of June 8, 1987, regulates the profession.

The law determines that it is the nurse's exclusive duty to carry out NC and, in this context, the prescription of nursing care aims to guarantee the integrality/quality of care.

COFEN Resolution 159/93 establishes NC as a private activity for nurses.

Article 1 of COFEN resolution 358/2009 states that "The NP must be carried out deliberately and systematically in all environments, public or private, in which professional nursing care takes place", and article 3 states that "The NP must be based on theoretical
support that guides data collection, the establishment of nursing diagnoses and the planning of nursing actions or interventions; and that provides the basis for evaluating the nursing results achieved”.

It can be seen that the development of this simplified guide was based on the need to provide quick access to information pertinent to the anamnesis and physical examination, in other words, practical material to support the data collection phase of the NP, a method used to guide NC at Centro Universitário Piaget and other undergraduate nursing students at other HEIs.

One of the limitations of the study is to create an association between what is taught in theoretical classes and what is applied in practice, such as the teaching and application of NP. Therefore, teacher training becomes important in order to renew and determine the knowledge that will be developed with students, as well as define the theoretical framework of the areas that the institution uses as theoretical-practical activities and for practicing NP.¹

The disadvantages of using nursing guidelines can arise if a student chooses not to follow an institutional protocol. Professionals must have clear reasons for not doing so, what scientific evidence supports this decision, and understand that they will be individually responsible for their conduct. The existence of the protocol does not take away the autonomy of the professional - the professional is always responsible for what they do and when they use the guide.¹

The aim of this study is to alert HEIs and teaching staff to the need to use instruments that guide the learning and understanding of the physical examination in a comprehensive way by undergraduate nursing students, as well as to point out to working nurses the need for and importance of updating and raising awareness of the clinical practice of the physical examination, in order to draw the attention of employing organizations to the deserved and desired recognition of the category.¹

It is essential that nursing professionals, as well as future nurses and students, assimilate the relevance of the physical examination and how an assessment can improve their daily work. Gradually, this position must be taken up by nurses in order to group and analyze the relevant information gathered for decision-making and to efficiently carry out all their patient care functions.¹

Thus, developing strategies to computerize the guide in order to improve and facilitate nurses' daily work will reach more professionals in the Nursing field.
CONCLUSION

NC is the private act of nurses and a systematic approach that uses science in the care provided to patients, families, or communities. The discussion in this study emphasizes that, in order to carry out NC, the five stages of NP must be considered in a systematic, interrelated, and recurring way.²

Nursing consultations should be recorded in technical records or in the patient's chart, whether physical or electronic, to ensure visibility and continuity of care provided to patients, their families, and the community, demonstrating the nurse's autonomy. For analytical skills to mature, it will be necessary to reflect on each service provided, so that the experiences lived and critical and systematic thinking are highlighted in the care process, enabling students to take ownership of knowledge based on concepts and systematizations based on clinical nursing practice.²

It is believed that with a differentiated learning approach, an adequate and advanced potential for developing evidence-based critical thinking can be achieved. It should be noted that the use of protocols, such as the simplified NC guide, will help to train students to provide care and make consultations more dynamic, as well as plan the care provided.

In view of this important finding, simplified guidelines were drawn up to help nurses in their data collection practice, considering that this stage is the basis for the development of the subsequent stages of the NP. In undergraduate nursing courses, there is little emphasis on the subject of clinical practice. As an effective solution, a sequential physical examination guide in addition to the NP steps can serve as training for students. This guide has the potential to be reproducible and is available to nursing students and professionals at the Piaget University Center - Suzano / São Paulo, and to undergraduates from other HEIs. As mentioned, it can be used for a variety of purposes and is innovative due to its simplicity compared to other materials in the field.

CONTRIBUTIONS

All the authors contributed to the development of all the stages of the study, from the survey and collection of data to the analysis and discussion of the data, as well as the writing and critical review of the information gathered, including the approval of the final version of this study.

CONFLICT OF INTEREST
REFERENCES


Correspondence
Ana Paula Baptistelli dos Reis Santos
Email: APBREnfermagem@outlook.com

Copyright© 2024 Revista de Enfermagem UFPE on line/REUOL.
This is an open access article distributed under the CC BY 4.0 Creative Commons Attribution-ShareAlike 4.0 International License, which allows others to distribute, remix, adapt and create from your work, even for commercial purposes, as long as they credit you for the original creation. It is recommended to maximize the dissemination and use of licensed materials.