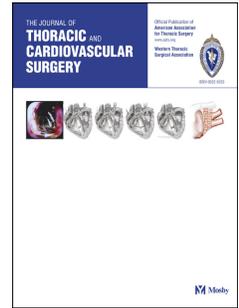


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Expert Consensus Guidelines: Examining Surgical Ablation for Atrial Fibrillation

Niv Ad, MD, Ralph J. Damiano, Jr., MD, Vinay Badhwar, MD, Hugh Calkins, MD, Mark La Meir, MD, Takashi Nitta, MD, PhD, Sari D. Holmes, PhD, Ali A. Weinstein, PhD, Marc Gillinov, MD

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Expert Consensus Guidelines: Examining Surgical Ablation for Atrial Fibrillation

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Glossary of Abbreviations

AAD	antiarrhythmic drugs
AATS	American Association for Thoracic Surgery
ACC	American College of Cardiology
AF	atrial fibrillation
AHA	American Heart Association
ATA	atrial tachyarrhythmias
DSWI	deep sternal wound infection
ICU	intensive care unit
LA	left atrium
LAA	left atrial appendage
LOS	length of stay
MCS	mental composite score
PCS	physical composite score
PVI	pulmonary vein isolation
RCT	randomized controlled trial
RF	radiofrequency
SF-12/SF-36	Medical Outcomes Study Short Form Health Survey
TIA	transient ischemic attack

Executive Summary

Research Question 1: Does concomitant surgical ablation for atrial fibrillation increase the incidence of perioperative morbidity?

Recommendation #1. Addition of a concomitant surgical ablation procedure for atrial fibrillation does not increase incidence of perioperative morbidity.

Class IIa: It is reasonable to choose to perform a concomitant surgical ablation procedure for patients with a history of atrial fibrillation over no treatment of atrial fibrillation because the incidence of perioperative morbidity is not increased by surgical ablation.

Level of Evidence:

- Level A for deep sternal wound infection, pneumonia, reoperation for bleeding, and renal failure requiring dialysis
- Level B-R for ICU length of stay and total hospital length of stay
- Level B-NR for readmission <30 days and renal failure

Research Question #2A: Does concomitant surgical ablation for atrial fibrillation reduce the incidence of early stroke/transient ischemic attack (TIA)?

Recommendation #2. Addition of a concomitant surgical ablation procedure for atrial fibrillation does not change the incidence of early stroke/TIA.

Class IIa: It is reasonable to choose to perform a concomitant surgical ablation procedure for patients with a history of atrial fibrillation over no treatment of atrial fibrillation because there is no increased risk of early stroke/TIA.

Level of Evidence: Level A

Research Question #2B. Does concomitant surgical ablation for atrial fibrillation reduce the incidence of late stroke/TIA?

Recommendation #3. Overall, addition of a concomitant surgical ablation procedure for atrial fibrillation does not change the incidence of late stroke/TIA, but subgroup analysis of non-randomized controlled trials (RCTs) found a significant reduction in late stroke/TIA incidence.

Class IIa: It is reasonable to choose to perform a concomitant surgical ablation procedure for patients with a history of atrial fibrillation over no treatment of atrial fibrillation because the incidence of late stroke/TIA is unaffected or decreased by surgical ablation.

Level of Evidence:

- Level A for no change in incidence of late stroke/TIA (up to 1 year of follow-up after surgery)
- Level B-NR for reduction in incidence of late stroke/TIA (>1 year of follow-up after surgery)

Research Question #3. Does concomitant surgical ablation for atrial fibrillation improve health-related quality of life and atrial fibrillation (AF)-related symptoms?

Recommendation #4. A surgical procedure that includes concomitant surgical ablation for AF does improve health-related quality of life, but this improvement is similar to that observed in patients who undergo cardiac surgery without surgical ablation. Addition of concomitant surgical ablation for atrial fibrillation does improve AF-related symptoms and this improvement is greater than in patients without surgical ablation.

Class IIa: It is reasonable to choose to perform a concomitant surgical ablation procedure for patients with a history of AF over no treatment of atrial fibrillation because there is significant improvement in health-related quality of life and AF-related symptoms associated with surgical ablation.

Level of Evidence:

- Level B-R for health-related quality of life
- Level C-LD for AF-related symptoms

Research Question #4A: Does concomitant surgical ablation for atrial fibrillation improve short-term survival?

Recommendation #5. Addition of concomitant surgical ablation for atrial fibrillation does improve 30-day operative mortality.

Class I: It is recommended to choose to perform a concomitant surgical ablation procedure for patients with a history of atrial fibrillation over no treatment of atrial fibrillation because there is significant improvement in operative survival associated with surgical ablation.

Level of Evidence: Level A

Research Question #4B: Does concomitant surgical ablation for atrial fibrillation improve long-term survival (>30 days)?

Recommendation #6. Overall, addition of a concomitant surgical ablation procedure for atrial fibrillation improves long-term survival, but subgroup analysis of RCTs found no significant improvement.

Class IIa: It is reasonable to choose to perform a concomitant surgical ablation procedure for patients with a history of atrial fibrillation over no treatment of atrial fibrillation because long-term survival is unaffected or improved by surgical ablation.

Level of Evidence:

- Level A for no change in long-term survival (up to 1 year after surgery)
- Level B-NR for improvement in long-term survival (>1 year after surgery)

Research Question #5: What are the indications for a hybrid ablation or stand alone off-pump epicardial ablation in patients with atrial fibrillation?

Recommendation #7. Overall, hybrid procedures have shown promising results compared to percutaneous catheter ablation in a subgroup of symptomatic patients with AF in which medical treatment and/or percutaneous catheter ablation have failed.

Class IIb: Hybrid procedures may be considered as a stand alone procedure in patients with appropriate indications and by an experienced heart team.

Level of Evidence: Level B-NR

Recommendation #8. Overall, minimally invasive approaches to isolate the pulmonary veins bilaterally have shown promising results compared to percutaneous catheter ablation in a subgroup of symptomatic patients with paroxysmal AF and a small left atrium in which medical treatment and/or percutaneous catheter ablation have failed.

Class IIa: It is reasonable to perform stand alone surgical ablation for pulmonary vein isolation in patients with symptomatic paroxysmal AF and small left atria.

Level of Evidence: Level B-R

Research Question #6: Which surgical ablation devices are associated with reliable transmural lesions?

Recommendation #9. The best evidence exists for the use of bipolar radiofrequency clamps and cryoablation devices, which have become integral parts of many procedures including pulmonary vein isolation and the Cox maze IV procedure. The use of epicardial unipolar radiofrequency ablation outside of clinical trials is not recommended, as its efficacy remains questionable.

- a. Empty arrested or beating heart: recommended ablation devices for pulmonary vein isolation are bipolar radiofrequency clamps or reusable/disposable cryoprobes
- b. Beating heart: bipolar radiofrequency clamps are effective to isolate pulmonary veins and recommended with mandatory testing for exit and/or entrance block
- c. Beating heart: surface bipolar radiofrequency devices may be recommended for free wall linear ablation when lesion integrity can be tested and multiple applications are recommended to achieve adequate lesion depth
- d. Beating heart: epicardial cryoablation is not recommended, but endocardial cryoablation is recommended for free wall linear ablation due to the high degree of transmurality
- e. Clinical trials of hybrid procedures: only settings where epicardial unipolar radiofrequency devices may be applied provided it is accompanied by acute lesion integrity testing
- f. When ablating with any device, coronary arteries should be identified and avoided

Research Question #7: What is the impact of surgeon experience with surgical ablation on return to sinus rhythm in patients with AF?

Recommendation #10. Training and education should be completed prior to the performance of surgical ablation. We highly recommend surgeons that are new to surgical AF be proctored by an experienced surgeon for 3-5 cases prior to performing surgical ablation alone.

Class I: Training and education should be considered prior to the performance of surgical ablation, but the effectiveness of a training program is unclear. More specific research needs to be conducted since there have been very limited populations evaluated.

Level of Evidence: Level C

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1 INTRODUCTION

2
3 The surgical treatment for atrial fibrillation is well established and performed. Atrial
4 fibrillation (AF) is being treated as a stand alone procedure or concomitantly with valve,
5 coronary bypass or other types of cardiac surgical procedures. This document was put
6 together to serve as guidelines and provide recommendations related to the general
7 outcomes associated with surgical ablation, the state of hybrid procedures, the optimal
8 ablation tools available and recommendations for the appropriate education and training
9 of surgeons in the field.

10
11 The Cox-Maze procedure was first performed in 1987 by Dr. James L. Cox and the report
12 summarizing the experience with the Cox-Maze I procedure was published in 1991¹. The
13 original Cox-Maze was performed as a cut and sew procedure combined with focal
14 cryoablations both in the right and the left atrium and evolved from the Cox-Maze I to III
15 to address issues with sinus node function and right to left atrial conduction that resulted
16 from the Cox-Maze I². The Cox-Maze III procedure was then applied extensively in
17 clinical practice³.

18
19 Several modifications to the original lesion set have been introduced as well as the
20 introduction of surgical ablation tools that utilize different energy sources (Figure 1)^{4,5}.
21 These different energy sources were applied both to perform lesion sets confined to the
22 left atrium pulmonary vein isolation only or more extensive lesion set) or a full right and
23 left atrial lesion set⁶⁻⁸. Despite the proven success of the Cox-Maze procedure and
24 surgical ablation, referring general surgeons and physicians remain somewhat reluctant to
25 adopt the procedure. A clear difference was documented for surgeon experience in the
26 percent of AF patients treated concomitantly during cardiac surgical procedures⁹. The
27 explanation for such a unique phenomenon in the surgical practice is not easy, but can
28 probably be attributed to the perceived risk associated with the procedure, the level of
29 training of the surgeons, and the lack of recognition of the clinical importance of atrial
30 fibrillation.

31
32 These AATS guidelines are focused less on the efficacy of surgical ablation and more on
33 the surgical outcomes, both short and long term. We also addressed the hybrid surgical
34 ablation procedures that are performed together by electrophysiologists and cardiac
35 surgeons. These new procedures may add to our ability to treat AF patients successfully.

36
37 It is clear that the success of any ablation procedure is dependent on the lesion pattern
38 and the quality of the lesion. Surgeons should be familiar with the different lesion set
39 options, and the efficacy of the ablation tool in use.

40
41 The AATS committee was tasked with the following:

- 42 I. To present a current analysis of the published literature and present a balanced view.
- 43 II. To provide evidence based clinical practice recommendations.
- 44 III. To address the quality and the effectiveness of the different energy sources.
- 45 IV. To discuss the education and the training requirement for surgeons that are

46 performing surgical ablation procedures
47

48 PREAMBLE

49
50 Our mission was to develop evidence-based guidelines on surgical ablation for the
51 treatment of atrial fibrillation. Ten experts were invited by the American Association for
52 Thoracic Surgery (AATS) leadership to participate in this effort: 6 cardiac surgeons, 1
53 electrophysiologist, and 2 biostatisticians.
54

55 **Methods of Review**

56
57 Members were tasked with making recommendation based on a review of the literature
58 and meta-analyses of the literature (if it was possible). The task force panel graded the
59 class of recommendation and the level of evidence for each of the research
60 questions/recommendations according to the standards published by the Institute of
61 Medicine. The five different classes of recommendation are: Class I (strong), IIa
62 (moderate), IIb (weak), III (no benefit, moderate), and Class III (harm, strong). The five
63 levels of evidence are: Level A, B-R (randomized), B-NR (non-randomized), C-LD
64 (limited data), and Level C-EO (expert opinion).
65

66 Meta-analyses were conducted to investigate the four research questions within Aim 1
67 (safety and efficacy of surgical ablation). Relevant studies were identified through an
68 electronic search of PubMed using comprehensive search terms for each of the relevant
69 study questions (Supplemental Table 1). Reference lists of selected articles were
70 reviewed for other potentially relevant citations as needed. The study period was
71 confined to January 2000 through December 2015. Inclusion criteria comprised studies
72 with concomitant surgical ablation procedures (full lesion set or limited) in the adult
73 human population and a comparison group present. Only English language studies were
74 included. There were no criteria limiting the type of lesion set performed or energy
75 source used. Therefore, the included studies were variable on these components of
76 surgical ablation.
77

78 For Research Question 1 (“Does concomitant surgical ablation for atrial fibrillation
79 increase the incidence of perioperative morbidity?”) the outcome was operationalized as
80 complications, excluding stroke and mortality within 30 days of surgery as these
81 outcomes were examined in separate research questions. The following complications
82 were included: deep sternal wound infection (DSWI), pneumonia, reoperation for
83 bleeding, renal failure, renal failure requiring dialysis, readmission < 30 days, length of
84 stay (LOS) in the intensive care unit (ICU), and total hospital LOS. A total of 905 studies
85 were identified from the original PubMed search, of which 300 were reviewed in depth
86 for inclusion, and 27 studies ultimately met all inclusion criteria¹⁰⁻³⁶. The remaining 273
87 studies were excluded due to no comparison group ($n = 245$), case report ($n = 7$), no
88 outcome data ($n = 17$), or duplicate data from the same investigators ($n = 4$).
89

90 For Research Question 2 (“Does concomitant surgical ablation for atrial fibrillation
91 impact the incidence of early and late stroke/TIA?”) the outcome was separated into early
92 (in-hospital or <30 days) stroke and late or follow-up stroke. A total of 614 studies were
93 identified through the PubMed search and an additional 20 studies were identified
94 through review of reference lists of other articles. Of these studies, 87 were reviewed in
95 depth for inclusion, and 20 ultimately met all inclusion criteria^{13,18,22–24,26–28,30–33,35–42}. The
96 remaining 67 studies were excluded due to no comparison group ($n = 23$), catheter
97 ablation rather than surgical ablation ($n = 17$), duplicate data ($n = 10$), no ablation ($n = 7$),
98 reviews ($n = 6$), and no outcome data ($n = 4$).

99
100 For Research Question 3 (“Does concomitant surgical ablation for atrial fibrillation
101 improve health-related quality of life and AF-related symptoms?”), a standard meta-
102 analysis was not feasible due to heterogeneity in methods, postoperative time points, and
103 measures among studies. Therefore, a systematic review of the relevant studies was
104 undertaken instead, which also allowed for inclusion of studies with no comparison group
105 on these outcomes. From a total of 222 studies found through a PubMed search, 9 studies
106 were selected for inclusion in the systematic review^{10,24,33,39,43–47}. These included 4 RCT
107 studies, 2 non-RCT studies, and 3 studies with no control group. All studies examined
108 HRQL and 4 of the studies also investigated symptom status.

109
110 For Research Question 4 (“Does concomitant surgical ablation for atrial fibrillation
111 improve perioperative and long-term survival?”) the outcome was separated into short-
112 term (<30 days) and long-term (≥ 12 months) mortality. A total of 905 studies were
113 identified from the original PubMed search, of which 300 were reviewed in depth for
114 inclusion, and 38 studies ultimately met all inclusion criteria^{10–20,22–36,40,42,48–57}. The
115 remaining 262 studies were excluded due to no comparison group ($n = 245$), case report
116 ($n = 7$), no outcome ($n = 6$), or duplicate data from the same investigators ($n = 4$).

117
118 All meta-analyses were conducted using Comprehensive Meta-Analysis Version 2.2.064
119 (Biostat, Inc., Englewood, NJ). Effect sizes were able to be generated from studies with
120 various outcome data presentations in order to combine the most studies possible for each
121 question. Heterogeneity for each outcome was tested using Cochran’s Q value and the I^2
122 statistic. Analyses with significant levels of heterogeneity were conducted using random
123 effects models whereas all other analyses were conducted using fixed effects modeling.
124 Forest plots were generated for each outcome and separately for RCT and non-RCT
125 studies when necessary, which was identified as the most common source of
126 heterogeneity for these analyses.

127
128 For Aims 2, 3, and 4, meta-analyses were not possible based on the current state of the
129 literature. For these aims, literature summaries were conducted for each respective aim.
130 Aim 3, which focuses on the evidence for devices, will not have class or level of evidence
131 because the literature is based on animal data and is too unique for systematic
132 combination. Then these summaries were submitted for full task force review and
133 consideration. A consensus among the task force members was achieved prior to the
134 adoption of the recommendations.

135

136 A final draft was prepared by authors N.A. and S.D.H. and this written draft was
137 distributed to all members of the task force for final comments.

138
139 The following recommendations are based on the best available evidence from ablation
140 surgery literature. This literature is relatively small in some areas and at those points,
141 expert opinion was substituted for research literature in order to make recommendations.
142 The recommendations are classified according to the AHA/ACC scheme⁵⁸ (Figure 2) and
143 a summary of each can be found in Table 1.

144

145 **Target Audience and the Patient Population**

146

147 These guidelines are intended for cardiothoracic surgeons operating on patients with
148 atrial fibrillation, as well as cardiologists and electrophysiologists who refer patients for
149 surgical intervention.

150

151 **EPIDEMIOLOGY OF ATRIAL FIBRILLATION, ITS IMPACT** 152 **ON OUTCOMES, COST, AND MORBIDITY**

153

154 Atrial fibrillation currently affects approximately 2.2 million patients in the United States
155 and this figure is projected to at least double in the next 25 years⁵⁹. Approximately, 2% of
156 those younger than age 65 have atrial fibrillation, while that number increases to about
157 9% with those older than age 65⁶⁰. African-Americans are less likely to experience atrial
158 fibrillation than those of European descent.

159

160 Atrial fibrillation has a direct relationship to mortality and increased morbidity, especially
161 for risk of stroke. Specifically, atrial fibrillation is associated with 1.5 to 1.9 increase in
162 mortality risk, even after adjustment for many potential confounding variables including
163 pre-existing cardiovascular conditions⁶¹. The age-adjusted incidence of stroke is five
164 times greater when atrial fibrillation is present⁶². Hospitalizations with atrial fibrillation
165 as the primary diagnosis exceed 460,000 each year and the hospitalization is the primary
166 cost driver in the management of atrial fibrillation⁶³. Medical costs are much higher (73%
167 higher) in those with atrial fibrillation than in matched individuals without atrial
168 fibrillation with approximately 6 billion dollars in medical costs spent on atrial
169 fibrillation-related costs alone⁶³.

170

171

172 **RECOMMENDATIONS AND REASONING**

173

174 **AIM 1. Safety and Efficacy of Surgical Ablation**

175

176 *Research Question 1: Does concomitant surgical ablation for atrial fibrillation increase*
177 *the incidence of perioperative morbidity?*

Recommendation #1.

Addition of a concomitant surgical ablation procedure for atrial fibrillation does not increase incidence of perioperative morbidity (Class IIa, Level A for deep sternal wound infection, pneumonia, reoperation for bleeding, and renal failure requiring dialysis, Level B-R for ICU length of stay and total hospital length of stay, and Level B-NR for readmission <30 days and renal failure).

Reasoning

Overall, the current literature demonstrates decreased incidence of perioperative morbidity, including reduced incidence of pneumonia in the perioperative time frame and decreased lengths of stay in the ICU. When exclusively examining RCTs, it was also found that total length of stay was increased with concomitant surgical ablation.

The meta-analysis for Research Question #1 investigated the potential increase in morbidity in concomitant surgical ablation examining the following outcome variables: pneumonia, deep sternal wound infection, length of stay in the ICU, total hospital stay, readmissions within 30 days, reoperation for bleeding, renal failure, and renal failure requiring dialysis. The evidence from this meta-analysis indicates that the only perioperative morbidity significantly associated with concomitant surgical ablation for atrial fibrillation was reduced incidence of pneumonia in the perioperative time frame (OR = 0.474, 95% CI = 0.262–0.857, $P = 0.013$; Figure 3). In fact, the surgical ablation group had 53% reduced odds for perioperative pneumonia. With 5 RCT and 3 non-RCT studies included in this analysis and no significant heterogeneity identified ($I^2 = 12.621\%$, $Q = 8.011$, $P = 0.332$), the level of evidence is fairly strong to indicate that there is a benefit for the perioperative outcome of pneumonia associated with performing a concomitant surgical ablation procedure.

The evidence in this group of studies that met inclusion criteria showed no significant increase or reduction in the incidence of all other perioperative morbidities assessed, which included deep sternal wound infection (Figure 4), length of stay in the ICU (Figure 5), total hospital length of stay (Figure 6), readmissions within 30 days (Figure 7), reoperation for bleeding (Figure 8), renal failure (Figure 9), and renal failure requiring dialysis (Figure 10). The sample size was highest for reoperation for bleeding ($n = 15$) and total length of stay ($n = 14$) and lowest for readmissions within 30 days ($n = 2$), with all other analyses ranging from sample sizes of 4 to 9 studies. Publication bias was found to be low for pneumonia, deep sternal wound infection, reoperation for bleeding, renal failure, and renal failure requiring dialysis; moderate for ICU length of stay and total length of stay; undetermined for readmissions within 30 days due to small sample size.

The analyses of ICU length of stay ($I^2 = 79.118\%$, $Q = 38.311$, $P < 0.001$) and total hospital length of stay ($I^2 = 76.952\%$, $Q = 56.404$, $P < 0.001$) were the only two with a significant level of heterogeneity present and therefore the random effects results are reported. The fixed effects model results indicated a significant reduction in ICU and total length of stay associated with performing a concomitant surgical ablation procedure. It appears that separating the analyses by RCT and non-RCT studies shows a more consistent result in the length of stay outcomes for the RCT study subgroup analyses,

224 whereas more heterogeneity exists within the non-RCT study subgroup analyses. Within
225 the RCT study subgroup analyses, ICU length of stay was reduced with a concomitant
226 surgical ablation procedure (OR = 0.566, 95% CI = 0.346–0.925, $P = 0.023$), whereas
227 total length of stay was increased with a concomitant surgical ablation procedure (OR =
228 1.452, 95% CI = 1.115–1.890, $P = 0.006$).

229

230 *Research Question #2A: Does concomitant surgical ablation for atrial fibrillation reduce*
231 *the incidence of early stroke/transient ischemic attack (TIA)?*

232 **Recommendation #2.**

233 Addition of a concomitant surgical ablation procedure for atrial fibrillation does
234 not change the incidence of early stroke/TIA (Class IIa, Level A).

235

236 Reasoning

237 The current literature demonstrates neither increase nor decrease of incidence of early
238 stroke/TIA. Specifically, the meta-analysis indicates that there is no increase in the
239 incidence of early stroke/TIA for surgical ablation (OR = 0.463, 95% CI = 0.212–1.011,
240 $P = 0.053$; Figure 11). In fact, this combined effect appears to indicate that surgical
241 ablation actually decreases the incidence of perioperative stroke/TIA, but the analysis did
242 not reach statistical significance. Publication bias was found to be low for this analysis.
243 With 6 RCT and 6 non-RCT studies included in this analysis, the level of evidence is
244 fairly strong to indicate there is no perioperative safety issue, in regards to stroke/TIA,
245 associated with performing a concomitant surgical ablation procedure.

246

247 *Research Question #2B. Does concomitant surgical ablation for atrial fibrillation reduce*
248 *the incidence of late stroke/TIA?*

249 **Recommendation #3.**

250 Overall, addition of a concomitant surgical ablation procedure for atrial
251 fibrillation does not change the incidence of late stroke/TIA, but subgroup
252 analysis of non-randomized controlled trials (RCTs) found a significant reduction
253 in late stroke/TIA incidence (Class IIa, Level A for no change in incidence of late
254 stroke/TIA for up to 1 year of follow-up after surgery and
255 Level B-NR for reduction in incidence of late stroke/TIA greater than 1 year of
256 follow-up after surgery).

257

258 Reasoning

259 The overall evidence from a meta-analysis conducted to examine the incidence of late
260 stroke/TIA following concomitant surgical ablation indicates that there is no significant
261 decrease (or increase) in the incidence of late stroke/TIA for surgical ablation (OR =
262 0.505, 95% CI = 0.211–1.208, $P = 0.125$; Figure 12). However, further analyses found a
263 significant level of heterogeneity present for the follow-up stroke/TIA analysis ($I^2 =$
264 48.29%, $Q = 19.337$, $P = 0.036$). Therefore, subgroup analyses by duration of follow-up
265 were performed to evaluate this heterogeneity further. This research question was then
266 examined separately for RCT and non-RCT studies because it was noted that all 6 RCT
267 studies included a 12 month follow-up period, whereas the 5 non-RCT studies included
268 varying follow-up time periods, but all were longer than 12 months. The RCT studies

269 showed a consistent pattern with no decrease in follow-up stroke/TIA incidence
270 associated with surgical ablation during the first 12 months after surgery (OR = 1.014,
271 95% CI = 0.413–2.492, $P = 0.976$; Figure 13A). Conversely, the meta-analysis of non-
272 RCT studies showed a significantly lower incidence of follow-up stroke/TIA for the
273 patients with surgical ablation (OR = 0.269, 95% CI = 0.078–0.926, $P = 0.037$; Figure
274 13B). Neither subgroup analysis was found to have a significant level of heterogeneity,
275 but the non-RCT analysis did show more heterogeneity than the RCT analysis, likely due
276 to the varying follow-up time still present within the non-RCT analysis. Publication bias
277 was found to be moderate for this outcome.

278

279 *Research Question #3. Does concomitant surgical ablation for atrial fibrillation improve*
280 *health-related quality of life and AF-related symptoms?*

281 **Recommendation #4.**

282 A surgical procedure that includes concomitant surgical ablation for atrial
283 fibrillation does improve health-related quality of life, but this improvement is
284 similar to that observed in patients who undergo cardiac surgery without surgical
285 ablation. Addition of concomitant surgical ablation for atrial fibrillation does
286 improve AF-related symptoms and this improvement is greater than in patients
287 without surgical ablation. (Class IIa, Level B-R for health-related quality of life
288 and Level C-LD for AF-related symptoms).

289

290 Reasoning

291 Overall, the current literature demonstrates that surgical ablation patients have
292 comparable improvements in HRQL post-surgery, as well as comparable post-surgery
293 levels of HRQL. For AF-specific symptoms and AF-reported symptom frequency and
294 severity after surgery, surgical ablation patients demonstrated more positive
295 improvements than patients without surgical ablation.

296

297 Specifically, the evidence from the systematic review focusing on HRQL indicates that
298 when measured before and after surgery, cardiac surgery with surgical ablation can
299 improve HRQL, but these changes are similar for cardiac surgery patients without
300 surgical ablation. When measured only after surgery, patients with and without surgical
301 ablation can expect to report similar levels of HRQL.

302

303 All 4 RCT studies used a version of the Medical Outcomes Study Short Form Health
304 Survey (SF-12 or SF-36) to measure HRQL. Two studies included preoperative and
305 postoperative HRQL measures. Von Oppell and colleagues found that 5 of the 8 SF-36
306 subscale scores improved significantly between preoperative and postoperative measures,
307 but improvement was similar between treatment groups. Similarly, Jessurun and
308 colleagues found significant improvement from preoperative to postoperative measures
309 on 2 of the 8 SF-36 subscales in patients with surgical ablation, but the group without
310 surgical ablation also showed improvement in 2 of the 8 SF-36 subscales. The other two
311 studies included postoperative HRQL measures only. Gillinov and colleagues found no
312 significant difference in SF-12 mental composite score (MCS) or physical composite
313 score (PCS) at 1 year after surgery between patients with and without surgical ablation.
314 The study by Forlani and colleagues found that patients who underwent surgical ablation

315 were more likely to be in the “Good Quality of Life” group than the “Poor Quality of
316 Life” group after surgery, but there were no analyses of the raw SF-36 scores by
317 treatment group.
318 Both non-randomized controlled studies used matching techniques to select the control
319 groups. The results from these studies were comparable to the RCT studies. In the study
320 by Ad and colleagues, improvement in SF-12 PCS and MCS from preoperative to 6
321 months postoperative was similar for patients with and without surgical ablation. In
322 addition, the study by Johansson and colleagues found no significant difference on any
323 SF-36 scores between patients with and without surgical ablation when measured at long-
324 term follow-up after surgery.

325
326 In the 3 studies that did not include a control group, the results showed a consistent
327 message to the other controlled studies. Ad and colleagues found significant
328 improvement from preoperative to 1 year postoperative in SF-12 PCS and MCS whereas
329 Bakker and colleagues found no significant difference between their study sample and
330 general population normal values in any of the SF-36 subscales at follow-up after
331 surgery. The study by Grubitzsch and colleagues examined HRQL differently using the
332 Minnesota Living with Heart Failure Questionnaire and comparisons by CHF and rhythm
333 status after surgery. Patients with severe CHF who regained sinus rhythm after surgery
334 had lower MLHF total score and MLHF physical component score compared to patients
335 who did not regain SR, but no effect of rhythm status was found for patients with
336 moderate CHF.

337
338 In contrast to the HRQL results, the evidence from this systematic review indicates that
339 cardiac surgery with surgical ablation is associated with improvement in reported AF-
340 specific symptoms and reduced AF-related symptom frequency and severity after surgery
341 compared to patients without surgical ablation. Four studies examined the outcome of
342 symptom status, mostly those specific to AF. The RCT by Gillinov and colleagues found
343 that surgical ablation patients reported a significantly lower frequency of AF at 1 year
344 after surgery compared to patients without surgical ablation. In a non-randomized
345 controlled study, Johansson and colleagues found that severity but not frequency of AF-
346 specific symptoms was lower in the surgical ablation group compared to the control
347 group when measured at long-term follow-up. Similarly, in the study by Ad and
348 colleagues without a control group, the frequency and severity of AF-specific symptoms
349 decreased significantly from preoperative to 6 months postoperative. Using a different
350 measure of symptoms, the RCT by Jessurun and colleagues found that patient-reported
351 change in health was significantly improved from preoperative to 3 months after surgery
352 in patients both with and without surgical ablation, but only the patients with surgical
353 ablation had further significant improvement from 3 months to 12 months after surgery.

354
355 *Research Question #4A: Does concomitant surgical ablation for atrial fibrillation*
356 *improve operative survival (<30 days)?*

357 **Recommendation #5.**

358 Addition of concomitant surgical ablation for atrial fibrillation does improve 30-
359 day operative mortality (Class I, Level A).

360

361 Reasoning

362 The evidence indicates that surgical ablation is associated with improved survival in the
 363 perioperative time frame (OR = 0.643, 95% CI = 0.464–0.890, $P = 0.008$; Figure 14). In
 364 fact, the surgical ablation group had 36% reduced odds for perioperative mortality. With
 365 10 RCT and 14 non-RCT studies included in this analysis, no heterogeneity identified (I^2
 366 = 0%, $Q = 18.135$, $P = 0.750$), and low publication bias, the level of evidence is fairly
 367 strong to indicate that there is a benefit for short-term survival associated with
 368 performing a concomitant surgical ablation procedure.

369
 370 *Research Question #4B: Does concomitant surgical ablation for atrial fibrillation*
 371 *improve long-term survival (>30 days)?*

372 **Recommendation #6.**

373 Overall, addition of a concomitant surgical ablation procedure for atrial
 374 fibrillation improves long-term survival, but subgroup analysis of RCTs found no
 375 significant improvement (Class IIa, Level A for no change in long-term survival
 376 of up to 1 year after surgery and Level B-NR for improvement in long-term
 377 survival of greater than 1 year after surgery).

378 Reasoning

379 The overall evidence indicates that there is a significant improvement in long-term
 380 survival for surgical ablation (OR = 0.486, 95% CI = 0.355–0.665, $P < 0.001$; Figure 15).
 381 However, further analyses found a significant level of heterogeneity present for the long-
 382 term survival analysis ($I^2 = 40.41\%$, $Q = 45.306$, $P = 0.015$). Therefore, subgroup
 383 analyses by study design were performed to evaluate this heterogeneity further. Research
 384 Question 4B was examined separately for RCT and non-RCT studies because it was
 385 noted that all except for 3 of the 15 RCT studies included a 12-month follow-up period,
 386 whereas the 13 non-RCT studies included varying follow-up time periods, but all include
 387 more than 12 months of follow-up. The RCT studies showed a consistent pattern with no
 388 significant improvement in long-term survival associated with surgical ablation during
 389 approximately the first 12 months after surgery (OR = 0.910, 95% CI = 0.588–1.410, $P =$
 390 0.673 ; Figure 16A). Conversely, the meta-analysis of non-RCT studies showed a
 391 significant improvement in long-term survival with concomitant surgical ablation (OR =
 392 0.360 , 95% CI = 0.248–0.522, $P < 0.001$; Figure 16B). The RCT analysis did not have
 393 significant heterogeneity ($I^2 = 0\%$, $P = 0.885$), but the non-RCT analysis did identify
 394 significant heterogeneity ($I^2 = 50.91\%$, $P = 0.018$), likely due to the varying follow-up
 395 times still present within the non-RCT analysis. Publication bias was found to be
 396 moderate for this outcome.
 397
 398

399 **AIM 2. Indications for Surgical Ablation Using Hybrid Approaches**

400

401 *Research Question #5: What are the indications for a hybrid ablation or stand alone off-*
 402 *pump epicardial ablation in patients with atrial fibrillation?*

403 **Recommendation #7.**
404 Overall, hybrid procedures have shown promising results compared to
405 percutaneous catheter ablation in a subgroup of symptomatic patients with AF in
406 which medical treatment and/or percutaneous catheter ablation have failed (Class
407 IIb, Level B-NR).

408 **Recommendation #8.**
409 Overall, minimally invasive approaches to isolate the pulmonary veins bilaterally
410 have shown promising results compared to percutaneous catheter ablation in a
411 subgroup of symptomatic patients with paroxysmal AF and a small left atrium in
412 which medical treatment and/or percutaneous catheter ablation have failed (Class
413 IIa, Level B-R).

414
415 Reasoning

416 The improvement of ablation technology makes surgical approaches in patients with
417 stand-alone atrial fibrillation less invasive. The hybrid AF surgical ablation procedure is
418 defined, in the 2012 HRS/EHRA/ECAS Expert Consensus Statement on Catheter and
419 Surgical Ablation of Atrial Fibrillation, as a joint AF ablation procedure that is either a
420 part of a single “joint” procedure or performed as two pre-planned separate ablation
421 procedures separated by no more than six months of time⁶⁴. Hybrid ablation procedures
422 consist of epicardial surgical ablation combined with percutaneous endocardial ablation.
423 This collaborative effort encompasses partnerships between electrophysiologists and
424 cardiac surgeons in patient selection and treatment. The different hybrid ablation
425 approaches provide an innovative solution for the treatment of atrial fibrillation that can
426 be effective in experienced hands using refined techniques and energy source
427 applications. However, the application of these technologies must be evaluated in the
428 context of safety and the efficacy of alternative methods of surgical ablation, such as the
429 Cox maze procedure. A recent thorough meta-analysis compared Cox maze and hybrid
430 procedures to find that overall 1-year freedom from AF off AAD was 87 vs. 71%,
431 respectively, but the complication rates were higher with hybrid procedures⁶⁵.

432
433 Based on current experience, the hybrid approach with the most effective outcomes and
434 safety profile appears to be bilateral PVI procedures performed surgically with LAA
435 management combined with different endocardial ablation protocols.

436
437 Hybrid approaches based upon the collaboration of the electrophysiologist and cardiac
438 surgeon could expand the indications for more effective stand-alone interventions for AF
439 in the future.

440
441 With current surgical ablation tools designed for beating heart AF ablation, technical
442 difficulties are still a potential concern, especially with respect to transmuralty of the
443 lesion lines. To better understand the quality of the lesions that are created and the impact
444 of the lesion set, a hybrid approach was designed. The principles of these approaches are
445 based upon the understanding that it is possible to apply mapping techniques from
446 electrophysiologists to surgical epicardial ablation techniques when performed on the
447 beating heart. The add-on approach can potentially improve the quality of the lesion line
448 and lesion set if necessary. In reality, hybrid procedures are often being performed in a

449 single stage procedure⁶⁶. Currently there is not enough evidence to distinguish between
450 the single or two stage approaches due to the lack of direct comparison and the
451 significant variability in the procedure with regards to lesion set, energy sources, and
452 procedural endpoints.

453

454 Different hybrid surgical ablation lesions sets are applied, usually in a manner less than
455 the full Cox maze IV lesion set. They are performed epicardially via minimally invasive
456 non-sternotomy approaches without cardiopulmonary bypass, followed by catheter-based
457 endocardial mapping, and if necessary additional ablation. Within this category of
458 surgical ablation therapy, there are three general categories of innovative procedures
459 currently being performed:

460

- 461 I. Bilateral pulmonary vein isolation (PVI) procedures inclusive of left atrial
462 appendage (LAA) management. This includes a bilateral thoracoscopic or
463 thoracotomy approach to perform isolated right and left antral PVI pairs with or
464 without additional linear lesions on the left and right atrium. An alternative
465 approach is to perform a posterior PVI encircling box lesion.
- 466 II. Unilateral thoracoscopic PVI posterior encircling box lesion without management
467 of the LAA.
- 468 III. Alternative approaches to posterior LA wall epicardial ablation lesion (i.e.,
469 pericardioscopic epicardial debulking ablation procedures “convergent method”)
470 without management of the LAA.

471

472 The pathophysiologic basis behind the potential validity of targeted epicardial minimally
473 invasive ablation, as a concept, may rest in the failures of catheter-based ablation and in
474 the established AF mechanisms of macro-reentrant rotors degrading to include the
475 complex foci of atrial wall fibrosis as AF duration and persistence increase⁶⁷⁻⁷⁰. This is
476 further informed by anatomic substrates that could be the generation of AF as
477 extrapulmonary triggers located in the superior vena cava, ligament of Marshall, and the
478 epicardial ridge between the left pulmonary vein and the LAA⁷⁰.

479

480 Less often performed, stand-alone surgical ablations comprise only 8% of ablation
481 procedures performed in the Society of Thoracic Surgeons Adult Cardiac Surgery
482 Database⁷¹. Nevertheless, the ability to provide minimally invasive epicardial ablation
483 procedures without the need for cardiopulmonary bypass or sternotomy remains an
484 attractive option for patients and for electrophysiologists. In fact, a recent review
485 demonstrated the Cox maze procedure is the most effective minimally invasive surgical
486 strategy for the treatment of stand-alone AF⁶⁵. Each of the three categories of hybrid
487 ablation techniques will be briefly addressed and available data reviewed. In the future it
488 will be necessary to compare these different techniques in order to create an evidence-
489 based decision tree for the best surgical approach. However, currently there is not enough
490 published data comparing these techniques to create such a decision tree.

491

492 *Bilateral PVI and management of LAA*

493

494 The technique of thoracoscopic port-only bilateral epicardial ablation was established a
495 decade ago to be a safe and initially effective strategy to introduce the encircling PVI box
496 lesion using alternative energy sources⁷². While energy sources such as microwave
497 proved not to deliver effective lesions⁷³, several groups from around the world have since
498 documented that RF ablation devices applied using this platform can result in good mid-
499 term outcomes⁷⁴. Similarly, the application of an RF clamp to create PVI antral pairs via
500 bilateral thoracotomies has been established as a safe procedure with reasonable short
501 term efficacy⁷⁵.

502
503 It was not until groups, such as those led by Damiano⁷⁶, began studying modes of failure
504 of epicardial PVI ablation that we learned of the common occurrence of late gaps in
505 ablation lines despite initial operative confirmation of pulmonary vein exit block. This
506 information established a potential value for combining epicardial PVI with endocardial
507 mapping and ablation. Early experiences with these so called “hybrid” approaches
508 included immediate intraoperative or periprocedural catheter-based confirmation of
509 lesions and the application of additional endocardial completion lesions as necessary⁷⁷.
510 Immediate EP lab assessments of epicardial lesions may not only provide logistical
511 challenges, but may miss late ablation gaps that are electrically unmasked following
512 resolution of the acute inflammatory process of surgical ablation. As such, early multi-
513 author results assembled following hybrid ablation revealed freedom from AF off of
514 AAD for paroxysmal AF of 75%, persistent AF of 67%, and long-standing AF of 43%⁷⁸.

515
516 Several authors have pursued hybrid AF ablation and epicardial LAA exclusion in
517 combination with either immediate staged or interval staged EP catheter-based mapping
518 and treatment. The majority of the available studies are single institution experiences
519 describing cases of heterogeneous AF types.

520
521 The group from Maastricht, led by La Meir and Pison, has been a pioneer in this field⁷⁹⁻
522 ⁸¹. Utilizing a bipolar RF clamp and a linear RF pen (AtriCure Inc., West Chester, OH),
523 they diligently performed epicardial bilateral antral PVI, box lesion, mitral isthmus line,
524 coronary sinus lesion, and SVC isolation concluding with LAA staple exclusion. This
525 was followed by immediate staged catheter-based analysis using rapid atrial pacing
526 induction. In their total of 78 patients from 2009 to 2012, 28 (36%) required endocardial
527 completion of posterior LA lesions and 10 required mitral line adjustment. They had no
528 30-day mortality and 6 patients had major complications. Their 1-year freedom from AF
529 and AAD measured by 7-day Holter was 87% overall, 87% (43/49) for persistent AF
530 patients.

531
532 Mahapatra et al. reported on 15 persistent AF patients in whom they performed the same
533 lesions with the same energy source (AtriCure Inc., West Chester, OH), but with a staged
534 catheter-based assessment of 4-5 days⁸². They found that 4/15 (27%) had gaps in the roof
535 line and mitral lines requiring endocardial consolidation as well as ablation of inducible
536 flutter to result in a 1-year freedom from AF and AAD by 7-day Holter in 13 of the 14
537 patients followed (93%).

538

539 Kurfirst et al. performed bilateral PVI box lesion and an additional roof line with the
540 bipolar clamp and RF pen (AtriCure Inc., West Chester, OH) and LAA exclusion with
541 clips in 30 patients with persistent AF⁸³. Importantly, they chose to perform the catheter-
542 based component of the hybrid procedure at 3 months postoperatively and they found that
543 gaps occurred in 77-87% of the PVI lesions, nearly 70% of the roof lines, and 40% of the
544 floor lines requiring endocardial line consolidation. Nevertheless, they were able to
545 obtain a 1-year freedom from AF and AAD by 7-day Holter of 90% (27/30).

546
547 Lee et al. applied a RF Cardioblate Gemini-X clamp (Medtronic, Minneapolis, MN) to
548 perform bilateral PVI only and LAA staple exclusion in 25 patients⁸⁴. Catheter-based
549 assessment was performed only in 7 patients in a delayed interval of > 3 months based on
550 recurrence of AF to find that all 7 had PV reconnection requiring endocardial ablation
551 and completion of mitral lines. The 1-year freedom from AF and AAD by 7-day Holter
552 was achieved in 12/23 (52%).

553
554 *Unilateral thoracoscopic PVI encircling lesion without LAA exclusion*

555
556 A unilateral thoracoscopic technique to encircle the pulmonary veins as a circumferential
557 box lesion has been developed using the unipolar RF suction Estech Cobra Adhere XL
558 device (AtriCure, Inc., West Chester, OH).

559
560 La Meir et al. applied this technique to 19 patients of mixed AF type followed by
561 immediate staged hybrid catheter-based assessment to find that all 19 had gaps in the box
562 lesion requiring ablation along with mitral line completion, and only 7/19 (36%) had 1-
563 year freedom from AF and AAD⁸⁵.

564
565 Bisleri et al. utilized the same approach in 45 patients with persistent AF, but with a
566 delayed staged hybrid catheter-based assessment at 30-45 days postoperatively⁸⁶. They
567 found PV reconnections in only 3/45 patients (7%). They measured 1-year freedom from
568 AF and AAD with an implantable loop recorder defined as AF over 5 minutes or overall
569 burden of over 0.5%, which occurred in 40/45 (89%) of their patients.

570
571 *Epicardial Pericardioscopic Posterior LA ablation (“Convergent Procedure”) without*
572 *LAA exclusion*

573
574 A novel approach to epicardial LA ablation has been recently explored with a vacuum
575 irrigated unipolar RF device delivered via laparoscopic trans-diaphragmatic
576 pericardioscopy using the Numeris Guided Coagulation System with VisiTrax (nContact
577 Surgical Inc., Morrisville, NC). This technique avoids entry into the thoracic cavity
578 altogether to provide non-encircling bilateral posterior antral lesions, a posterior box
579 lesion, a mitral isthmus line, a coronary sinus lesion, and an additional roof line, but this
580 does not permit LAA exclusion. The inferior and posterior left atrial surfaces may be
581 well-visualized, but the superior and anterior lesions are applied without direct
582 visualization, especially at the pericardial reflections. This “convergent” approach
583 permits a debulking of the posterior left atrium.

584

585 Gehi et al. report a series of 101 patients with AF heterogeneity using this procedure
 586 followed by immediate staged catheter-based assessment and found PVI gaps in only 4%,
 587 but additional roof lines and completion lines to the mitral isthmus were required in 90%
 588 of patients⁸⁷. They had 2 operative mortalities and 7 major complications and achieved a
 589 24-hour Holter documented 1-year freedom from AF and AAD in 46/69 (67%). Gersak
 590 reported a multi-institutional European experience with the convergent procedure in 73
 591 patients with persistent AF with mixed intervals of staged catheter-based assessment, but
 592 found PVI gaps in all patients at the pericardial reflections⁸⁸. Edgerton applied this
 593 procedure to 24 patients with persistent AF and found that 19% were free of AF and
 594 AAD at 24 months, but 3 patients died (12.5%), 4.2% had an acute stroke, and one had an
 595 atrio-esophageal fistula. These results led them to conclude that this procedure does not
 596 improve outcomes in patients with larger LA and persistent AF and there was evidence
 597 that this combined surgical/endocardial ablation approach increased complication rates
 598 and did not improve outcomes when compared to extensive endocardial ablation only⁸⁹.
 599

600 **AIM 3. Ablation Tools**

601

602 *Research Question #6: Which surgical ablation devices are associated with reliable*
 603 *transmural lesions?*

604

Recommendation #9.

605

The best evidence exists for the use of bipolar radiofrequency clamps and
 606 cryoablation devices, which have become integral parts of many procedures
 607 including pulmonary vein isolation and the Cox maze IV procedure. The use of
 608 epicardial unipolar radiofrequency ablation outside of clinical trials is not
 609 recommended, as its efficacy remains questionable.

610

Reasoning

611

Ablation devices have revolutionized the surgical treatment of atrial fibrillation. The best
 612 evidence exists for the use of bipolar radiofrequency clamps and cryoablation devices,
 613 which have become an integral part of many procedures including the Cox-Maze IV⁹⁰.
 614 We do not recommend the use of epicardial unipolar radiofrequency ablation outside
 615 clinical trials, as its efficacy is questionable. Cryoablation is most effective when used on
 616 an empty heart, especially when it is applied endocardially. Full beating-heart epicardial
 617 cryoablation is not recommended, as the heat sink effect of circulating blood can render
 618 this technique ineffective⁹¹. Further research is necessary to produce devices that can
 619 complete a full Cox-Maze lesion set safely on the beating heart. The following general
 620 recommendations are given based on available experimental and clinical evidence:
 621

622

623

- a. Empty arrested or beating heart: recommended ablation devices for
 624 pulmonary vein isolation are bipolar radiofrequency clamps or
 625 reusable/disposable cryoprobes
- b. Beating heart: bipolar radiofrequency clamps are effective to isolate
 626 pulmonary veins and recommended with mandatory testing for exit and/or
 627 entrance block
 628

- 629 c. Beating heart: surface bipolar radiofrequency devices may be
 630 recommended for free wall linear ablation when lesion integrity can be
 631 tested and multiple applications are recommended to achieve adequate
 632 lesion depth
- 633 d. Beating heart: epicardial cryoablation is not recommended, but
 634 endocardial cryoablation is recommended for free wall linear ablation due
 635 to the high degree of transmural
- 636 e. Clinical trials of hybrid procedures: only settings where epicardial
 637 unipolar radiofrequency devices may be applied provided it is
 638 accompanied by acute lesion integrity testing
- 639 f. When ablating with any device, coronary arteries should be identified and
 640 avoided

641 Reasoning

642 Over the last 15 years, the surgical treatment of atrial fibrillation (AF) has been
 643 transformed by the introduction of ablation devices to replace most of the incisions used
 644 in the original Cox-Maze procedure^{6,7}. Numerous technologies have been developed and
 645 tested both in animal models and in prospective clinical trials and retrospective case
 646 series. Current clinically available ablation devices use either unipolar or bipolar
 647 radiofrequency energy or cryothermal energy. Of note, there is only one device which
 648 carries a specific indication for ablation of atrial fibrillation; the remainder are FDA
 649 approved only for ablation of cardiac tissue.

650
 651 Current devices for surgical ablation of atrial fibrillation use either radiofrequency (RF)
 652 or cryothermal energy to ablate cardiac tissue. Radiofrequency ablation requires heating
 653 cardiac tissue to a temperature between 50 and 100 °C to cause coagulative necrosis.
 654 Both unipolar and bipolar radiofrequency devices are available. Cryoablation uses
 655 evaporative cooling to freeze cardiac tissue, leading to tissue necrosis. The available
 656 systems use nitrous oxide or argon as the refrigerant.

657 *Bipolar RF Clamps*

658
 659 In these devices, the electrodes are embedded in the jaws of the clamp. There are also
 660 bipolar linear devices in which the electrodes are made to be placed on the endocardial or
 661 epicardial surface.

662
 663 There are non-irrigated impedance-controlled dual electrode systems. It is the only device
 664 FDA approved with a specific indication for ablation of cardiac tissue for treatment of
 665 persistent or longstanding persistent AF during a concomitant procedure. Ablation should
 666 be performed until the audible tone becomes intermittent, which occurs when
 667 conductance reaches a stable minimal value. In a chronic porcine study, all lesions
 668 produced in this manner were transmural⁹². A version of this device has been modified
 669 for thoracoscopic use.

670
 671 Care needs to be taken when using non-irrigated bipolar RF clamps. The electrodes need
 672 to be cleaned after every 2-3 ablations, as char decreases conductance which will result in
 673
 674

675 inadequate ablation. Other factors such as air, fat, intraluminal catheters or electrodes and
676 other inanimate objects will also decrease conductance and limit ablation depth. These
677 should all be avoided, and the electrodes need to firmly clamp the tissue without folding
678 or imbricating the atria to be effective.

679

680 There are also irrigated impedance-controlled bipolar radiofrequency clamps. Irrigation is
681 thought to increase the size of lesions by limiting char. These devices were evaluated in
682 porcine models in two independent laboratories and showed a high rate of transmural
683 lesion formation, up to 99% at 30 days^{76,93}. Irrigated clamps do not need to be cleaned as
684 the irrigation prevents char formation. However, the same precautions need to be taken to
685 avoid factors which decrease conductance as stated above.

686

687 *Surface Bipolar Devices*

688

689 There are three surface bipolar radiofrequency devices available. These devices can be
690 applied epicardially or endocardially. Ablation times range from 10-40 seconds per the
691 manufacturer's instructions. Continuous lesions should be overlapped, as the highest risk
692 of an ablation gap is at the end of the device. These devices have shown variable results.
693 The Isolator® linear pen showed only a 64% overall rate of transmural lesion formation
694 with an 11% rate of tissue perforation in an acute porcine model⁹⁴. The Isolator®
695 multifunctional pen showed transmural lesion formation in 10 seconds in tissues less than
696 4 mm thick but had a maximum depth of penetration of only 6.1 mm.⁸ The Coolrail®
697 linear pen produced transmural lesions in 76% of lesions at 4 weeks in a porcine beating-heart
698 model^{95,96}, but was incapable of creating conduction block in a chronic animal model⁹⁶.

699

700 The COBRA Fusion™ 150 and 50 are suction-assisted temperature-controlled combined
701 bipolar and unipolar radiofrequency devices. These should be applied with -500 mmHg
702 vacuum and 60-120 s depending on the thickness of the tissue and the desired
703 temperature per the manufacturer's instructions. This system was shown to produce
704 transmural lesions in 94% of cross-sections evaluated in an acute porcine model,
705 although only 68% of lesions were transmural throughout their length⁹⁷.

706

707 *Unipolar RF Devices*

708

709 In general, unipolar epicardial radiofrequency ablation has shown poor efficacy for the
710 creation of transmural lesions. However, several devices remain on the market. The
711 Cardioblate® irrigated pen; this device was evaluated in an *in vitro* model, which showed
712 superior lesion size compared with conventional unipolar ablation, such as that found in
713 the Cardioblate® MAPS device⁹⁸. Epi-Sense® Coagulation System with VisiTrax® is
714 another suction- and perfusion-assisted unipolar RF device. It is produced in three
715 lengths, 1-3 cm. Results of animal studies with the nContact™ device have been variable.
716 One acute ovine study showed a 100% rate of transmural lesions⁹⁹, but a porcine acute
717 study showed only a 15% rate of transmural lesions⁹⁶.

718

719 *Cryoablation Devices*

720

721 Two manufacturers currently produce cryoablation devices for surgical cardiac ablation.
722 The cryoICE® system uses nitrous oxide to freeze tissue with a minimal probe
723 temperature of -50 to -70 °C. Nearly all (83/84) lesions produced using two minutes of
724 cryoablation with this system were transmural in a chronic porcine study¹⁰⁰. The
725 Cardioblate® CryoFlex, CryoFlex 10-S, and CryoFlex Clamp all use argon as the
726 refrigerant, reaching up to -160 °C. All are disposable. The CryoFlex clamp produced a
727 93% rate of transmural lesions in a chronic canine model¹⁰¹. The same study evaluated
728 linear epicardial lesions produced using the CryoFlex system; only 84% of linear lesions
729 were transmural after 180 s of ablation. Both technologies employ malleable disposable
730 cryoprobes that can be shaped to facilitate minimally invasive use.

731
732 Ablation should be performed by surgeons with appropriate training and experience.
733 Except within the context of clinical trials, only devices with proven efficacy should be
734 used. When possible, the presence of acute conduction block should be used to confirm
735 ablation efficacy. This is done by testing for exit and/or entrance block by pacing/sensing
736 from the right and left pulmonary veins.

737
738 Ablation devices ideally should be evaluated prospectively in an independent laboratory
739 with submission of results to peer-reviewed journals. Devices should be tested clinically
740 using previously evaluated lesion sets to minimize confusion. Clinical follow-up data
741 collected according to current guidelines should be the gold standard for evaluating a
742 device's effectiveness. Ablation success is defined as freedom from atrial
743 tachyarrhythmias (ATAs) and antiarrhythmic drugs at 12 months.³

744

745 **AIM 4. Training**

746

747 *Research Question #7: Should surgeons performing surgical ablation be required to*
748 *undergo basic training and education?*

749

750 **Recommendation #10.**

751 Surgical ablation procedures should require basic training, proctoring, and
752 education to improve surgeon understanding of atrial fibrillation, the surgical
753 options and improved outcomes. Training and education should be completed
754 prior to the performance of surgical ablation. We highly recommend surgeons that
755 are new to surgical AF be proctored by an experienced surgeon for 3-5 cases prior
756 to performing surgical ablation alone (Class I, Level C).

757

758 Reasoning

759 Currently there are no validated training plans or curricula for surgeons to complete
760 before performing surgical ablation of AF. Although surgical procedures to treat AF were
761 developed more than three decades ago, surgeons' approach to this problem has been
762 widely varied. The introduction of new ablation technologies and the creation of a large
763 number of different lesion sets have added to the complexity and confusion surrounding
764 surgical ablation of AF. It is clear that training and surgical experience influence both the
765 use of surgical ablation and the results^{9,43,102}. With increasing experience, surgeons are

766 more likely to perform an ablation in patients with pre-existing AF. Like with any other
767 cardiac surgical procedure, the percent of patients undergoing surgical ablation and the
768 success of such procedures may be superior when performed by experienced and well-
769 trained cardiac surgeons⁹. Optimization of patient outcomes requires a combination of
770 education and formal training that incorporates understanding of 1) the risks associated
771 with leaving AF untreated, 2) the risks associated with surgical ablation, 3) the
772 recommended procedure, including choice of lesion set and ablation technologies, and 4)
773 the results of surgical ablation.

774

775 *Risks associated with untreated AF*

776

777 It is axiomatic that surgeons should understand the conditions for which they are treating
778 patients. Cardiac surgical patients with preexisting AF have reduced long-term survival if
779 the AF is left untreated⁴⁵. This holds true whether the patient's primary indication for
780 surgery is valvular heart disease or coronary artery disease. Careful analysis of the results
781 of surgical ablation of AF suggests that successful AF ablation may improve survival¹⁰³.
782 In addition, AF-related strokes are rare in patients who have undergone surgical ablation
783 of AF. It has been argued that this finding could be related also to LAA ligation, which is
784 anticipated to be addressed by the Left Atrial Appendage Occlusion Study (LAAOS) III
785 that is currently underway¹⁰⁴. Understanding the risks of untreated AF should prompt
786 surgeons to consider AF ablation in all cardiac surgical patients presenting with AF.

787

788 *Risks associated with treating AF*

789

790 Our extensive summary indicates that perioperative morbidity including stroke is not
791 increased with the addition of surgical ablation and we further found a short-term
792 survival benefit. Surgeons must understand that the addition of surgical ablation does not
793 increase the risk of major morbidity or mortality¹⁰. Multiple studies confirm that surgical
794 ablation is safe^{9,10,43,45,102,103,105}. Although surgical ablation does increase aortic cross-
795 clamp and cardiopulmonary bypass times, this does not translate into increased patient
796 risk. Surgical ablation may increase the risk of requiring a permanent pacemaker, but in
797 most studies this risk is small^{10,43,102}.

798

799 *Recommended ablation procedure*

800

801 Results of the cut-and-sew Cox-Maze III procedure were excellent, and this procedure
802 should therefore serve as the predicate for surgical ablation with new energy sources. All
803 surgeons should understand the biatrial lesion sets of the Cox-Maze III and energy-
804 assisted Cox-Maze IV procedures. Key components include isolation of the entire
805 posterior left atrium (including the pulmonary veins), a connecting lesion to the mitral
806 annulus that includes the coronary sinus, management of the left atrial appendage, and at
807 least one right atrial lesion that reaches the tricuspid annulus.

808

809 While a recent randomized controlled clinical trial provided some data concerning the
810 biatrial lesion set vs. a left atrial lesion set in patients with persistent and long-standing
811 persistent AF, the trial was not powered to confirm that a left atrial lesion set alone is

812 equivalent to a biatrial lesion set in such patients¹⁰. It may be appropriate to employ a left
813 atrial lesion set alone in selected patients with paroxysmal AF and normal left atrial size.

814

815 Once the surgeon is thoroughly versed in the choice of lesion set, he or she must
816 understand appropriate use of ablation technology. This requires that the surgeon invest
817 adequate time in understanding the technology and observe at least one surgical case
818 employing the particular ablation technology. It is further advisable that the surgeon be
819 proctored for his or her first ablation case. Surgeons should avail themselves of
820 proctorship(s) made available by any company that has FDA-approved technology for
821 AF ablation. The surgeon must understand proper lesion placement and pitfalls of
822 ablation technologies (gaps, bunching of tissue, inadequate duration of freeze-thaw
823 cycles, failure to clean the jaws of bipolar clamps, etc.). Once the surgeon has completed
824 training, he/she may begin performing AF ablation. The surgeon should keep a log of AF
825 ablation cases as this will aid in tabulating results (see below).

826

827 *Results of surgical ablation*

828

829 Before performing surgical ablation of AF, the surgeon must be well-versed in the
830 expected results. In general, freedom from AF at one year should be 70% or greater;
831 selected experts report success rates of 80% to 90%^{9,43,45,102,103,105}. Surgeons should
832 record their own results according to HRS guidelines; this requires long-term monitoring
833 at the 12 month mark⁶⁰. Surgeons should also record their rate for permanent pacemaker
834 implantation after AF ablation. In order to achieve the best results, surgeons should be
835 well-versed in the perioperative care of these patients. It is not enough to do a procedure
836 and simply send the patient home. Successful ablation begins in the operating room but
837 requires continued monitoring and medical management to achieve normal sinus rhythm.
838 Many patients require postoperative antiarrhythmic therapy and electrical cardioversion.
839 The surgeon must understand that successful ablation occurs over time and require effort.

840

841 *Summary*

842

843 Currently, there is no specific training that is required prior to a surgeon performing
844 surgical ablation. It may be necessary to establish credentialing criteria for surgeons
845 wanting to perform surgical ablation with novel technologies, including both proctoring
846 and mentoring protocols in the operating room. Training and mentoring is essential for
847 this technique to be implemented with the best possible outcomes for the patients.
848 Therefore we recommend that training and education be completed prior to the
849 performance of surgical ablation. This training and education should aim to provide
850 surgeons with the following⁶⁴:

851

- 852 1. Knowledge in atrial anatomy and appropriate patient selection
- 853 2. Basic understanding of the significance of the different lesion sets
- 854 3. Knowledge in the intraprocedural management of patients in terms of avoidance
of complications and their treatment
- 855 4. Knowledge and understanding in post procedural management and follow up.

856

857 It is also highly recommended to include surgical AF ablation during training¹⁰⁶.
858 Previously, it has been recommended to include 30-50 ablation cases during training^{64,106}
859 We recommend that surgical training for surgical ablation should follow this same
860 recommendation. We also highly recommend surgeons that are new to surgical AF be
861 proctored by an experienced surgeon for 3-5 cases prior to performing surgical ablation
862 alone. In terms of maintenance of proficiency level, surgeons with sufficient training
863 should aim to routinely perform surgical ablation cases.

864 RECOMMENDATIONS FOR FUTURE AATS EFFORTS

865 The task force recommends the establishment of uniform definitions for time points and
866 outcome measures so that systematic analyses can be conducted to more efficiently
867 determine the effectiveness and safety of surgical ablation. In addition, it is recommended
868 that more RCT trials are undertaken that are well-designed and well-controlled with
869 regard to lesion set technology and outcomes.

870 The clinical areas and studies that are recommended are:

- 871
- 872 • Well-designed studies to address long term survival and embolic complications
- 873 • Well-designed studies to develop a better understanding on the cost effectiveness
874 of surgical ablation
- 875 • Well-designed studies to assess the role of stand alone surgical ablation
876 procedures to include a Cox-Maze procedure and off pump procedures to include
877 the hybrid approach
- 878 • Training and education including surgical ablation should be included in the
879 residency curriculum
- 880

881 RECOMMENDATIONS FOR THE USE OF THE GUIDELINES

882 These guidelines are best used as a guide for practice and teaching. The applicability of
883 these recommendations to the individual patient should be evaluated on a case-by-case
884 basis, and only applied when clinically appropriate. In addition, these guidelines can
885 serve as a tool for uniform practices, to guide development of surgeon training protocols,
886 and to form the basis of uniform time points and outcomes for the thoracic surgical
887 community.

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891 here; all their other potential conflicts of interest were disclosed in writing.

892 SUMMARY

893 Surgical ablation is a safe and effective strategy for treatment of atrial fibrillation. It is
894 important to consider the indications for hybrid ablation or the stand alone off bypass
895 ablation. Bipolar radiofrequency clamps or reusable/disposable cryoprobes are the best
896 ablation devices, but when ablating, coronary arteries should be avoided. Training and
897 mentoring protocols for surgeons interested in performing surgical ablation need to be
898 created to ensure patient safety and beneficial outcomes. Future studies should use

899 standardized time points and outcome measures to enhance the ability to compare
900 outcomes across different studies.

ACCEPTED MANUSCRIPT

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TABLE 1.

Recommendation	Class	Level
#1: Perioperative Morbidity		
DSWI, pneumonia, bleeding reop, RF with dialysis	IIa	Level A
ICU stay, total LOS	IIa	Level B-R
Readmission <30 days, RF	IIa	Level B-NR
#2: Early stroke/TIA	IIa	Level A
#3: Late stroke/TIA		
Up to 1 year follow-up	IIa	Level A
>1 year follow-up	IIa	Level B-NR
#4: Quality of Life		
HRQL	IIa	Level B-R
AF-related symptoms	IIa	Level C-LD
#5: Short-term survival	I	Level A
#6: Long-term survival		
Up to 1 year follow-up	IIa	Level A
>1 year follow-up	IIa	Level B-NR
#7: Hybrid ablation	IIb	Level B-NR
#8: Stand alone off-pump epicardial ablation	IIa	Level B-R
#9: Surgical ablation device transmural	N/A	N/A
#10: Surgeon Experience	I	Level C

SUPPLEMENTAL TABLE 1.

Research Question Search Terms

#1: Perioperative Morbidity

((("atrial fibrillation" OR "AF" OR "afib") AND ("surgical ablation" OR "Maze" OR "Cox-Maze" OR "Cox maze" OR "ablation" OR "pulmonary vein isolation" OR "afib ablation" OR (afib AND ("therapy"[Subheading] OR "therapy" OR "treatment" OR "therapeutics"[MeSH Terms] OR "therapeutics"))) OR "af ablation" OR "persistent af ablation")) AND ("cardiac surgery" OR "heart surgery" OR "surgery" OR "surgical" OR "median sternotomy" OR "mid-sternotomy" OR "mid sternotomy" OR "mid sternum" OR "minimally invasive" OR "right thoracotomy")) AND ("survival" OR "mortality" OR "death")

#2: Stroke/TIA

((("cardiac surgery" OR "heart surgery" OR "surgery" OR "surgical" OR "median sternotomy" OR "mid-sternotomy" OR "mid sternotomy" OR "mid sternum" OR "minimally invasive" OR "right thoracotomy") AND ("surgical ablation" OR "Maze" OR "Cox-Maze" OR "Cox maze" OR "ablation" OR "pulmonary vein isolation" OR "afib ablation" OR "afib treatment" OR "af ablation" OR "persistent af ablation") AND ("atrial fibrillation" OR "AF" OR "afib")) AND ("stroke" OR "embolic stroke" OR "embolic event" OR "TIA" OR "transient ischemic attack" OR "transient ischaemic attack" OR "cerebrovascular accident" OR "CVA" OR "cerebrovascular insult" OR "CVI"))

#3: Quality of Life

(((((("atrial fibrillation" OR "AF" OR "afib")) AND ("surgical ablation" OR "Maze" OR "Cox-Maze" OR "Cox maze" OR "ablation" OR "pulmonary vein isolation" OR "afib ablation" OR (afib AND ("therapy"[Subheading] OR "therapy" OR "treatment" OR "therapeutics"[MeSH Terms] OR "therapeutics"))) OR "af ablation" OR "persistent af ablation")))) AND ("cardiac surgery" OR "heart surgery" OR "surgery" OR "surgical" OR "median sternotomy" OR "mid-sternotomy" OR "mid sternotomy" OR "mid sternum" OR "minimally invasive" OR "right thoracotomy")) AND ("HRQL" OR "health-related quality of life" OR "quality of life" OR "QOL" OR "health related quality of life" OR "SF-12" OR "Short Form 12" OR "SF-36" OR "Short Form 36"))

#4: Survival

((("atrial fibrillation" OR "AF" OR "afib") AND ("surgical ablation" OR "Maze" OR "Cox-Maze" OR "Cox maze" OR "ablation" OR "pulmonary vein isolation" OR "afib ablation" OR (afib AND ("therapy"[Subheading] OR "therapy" OR "treatment" OR "therapeutics"[MeSH Terms] OR "therapeutics"))) OR "af ablation" OR "persistent af ablation")) AND ("cardiac surgery" OR "heart surgery" OR "surgery" OR "surgical" OR "median sternotomy" OR "mid-sternotomy" OR "mid sternotomy" OR "mid sternum" OR "minimally invasive" OR "right thoracotomy")) AND ("survival" OR "mortality" OR "death")

FIGURE LEGENDS

Figure 1. Left atrial lesion sets for Cox maze IV procedure. (A) Most linear lesions are created with bipolar radiofrequency clamps; shaded in blue are cryolesions at the mitral isthmus (and left pulmonary veins for minimally invasive approach). (B) Linear lesions also can be created with cryoablation if required for minithoracotomies or reoperations. Right atrial lesion sets for Cox maze IV procedure. (A) Most linear lesions are created with bipolar radiofrequency clamps, and cryolesions are placed at two points on the tricuspid annulus through direct vision or small pursestring sutures (red arrows). (B) Linear lesions also can be created with cryoablation if required for minithoracotomies or reoperations. (Reprinted from *The Annals of Thoracic Surgery*, 103(1), Badhwar V, Rankin JS, Damiano RJ Jr, et al., *The Society of Thoracic Surgeons 2017 Clinical Practice Guidelines for the Surgical Treatment of Atrial Fibrillation*, pages 329–341, 2017. © [2014] Beth Croce)

Figure 2. Classification of recommendations and level of evidence using the ACC/AHA grading schema

Figure 3. Forest plot for pneumonia in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 4. Forest plot for deep sternal wound infection in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 5. Forest plot for length of stay in the ICU in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 6. Forest plot for total hospital stay in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 7. Forest plot for readmissions within 30 days with concomitant surgical ablation

Figure 8. Forest plot for reoperation for bleeding in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 9. Forest plot for renal failure in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 10. Forest plot for renal failure requiring dialysis in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 11. Forest plot for incidence of early stroke/TIA (in-hospital or < 30 days) with concomitant surgical ablation

Figure 12. Forest plot for incidence of late stroke/TIA with concomitant surgical ablation

Figure 13. (A) Forest plot for incidence of late stroke/TIA with concomitant surgical ablation in randomized controlled studies. (B) Forest plot for incidence of late stroke/TIA with concomitant surgical ablation in non-randomized controlled studies

Figure 14. Forest plot for improved survival in the perioperative time frame (< 30 days) with concomitant surgical ablation

Figure 15. Forest plot for improved long-term survival with concomitant surgical ablation

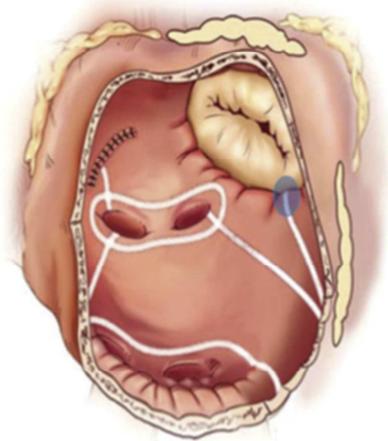
Figure 16. (A) Forest plot for long-term survival with concomitant surgical ablation in randomized controlled studies. (B) Forest plot for long-term survival with concomitant surgical ablation in non-randomized controlled studies

SIZE OF TREATMENT EFFECT

ESTIMATE OF CERTAINTY (PRECISION) OF TREATMENT EFFECT	CLASS I	CLASS IIa	CLASS IIb	CLASS III No Benefit or CLASS III Harm		
	<i>Benefit >>> Risk</i> Procedure/Treatment SHOULD be performed/administered	<i>Benefit >> Risk</i> Additional studies with <i>focused objectives needed</i> IT IS REASONABLE to perform procedure/administer treatment	<i>Benefit ≥ Risk</i> Additional studies with <i>broad objectives needed</i> ; additional registry data would be helpful Procedure/Treatment MAY BE CONSIDERED	Procedure/ Test	Treatment	
LEVEL A Multiple populations evaluated* Data derived from multiple randomized clinical trials or meta-analyses	<ul style="list-style-type: none"> Recommendation that procedure or treatment is useful/effective Sufficient evidence from multiple randomized trials or meta-analyses 	<ul style="list-style-type: none"> Recommendation in favor of treatment or procedure being useful/effective Some conflicting evidence from multiple randomized trials or meta-analyses 	<ul style="list-style-type: none"> Recommendation's usefulness/efficacy less well established Greater conflicting evidence from multiple randomized trials or meta-analyses 	COR III: No benefit	Not Helpful	No Proven Benefit
LEVEL B Limited populations evaluated* Data derived from a single randomized trial or nonrandomized studies	<ul style="list-style-type: none"> Recommendation that procedure or treatment is useful/effective Evidence from single randomized trial or nonrandomized studies 	<ul style="list-style-type: none"> Recommendation in favor of treatment or procedure being useful/effective Some conflicting evidence from single randomized trial or nonrandomized studies 	<ul style="list-style-type: none"> Recommendation's usefulness/efficacy less well established Greater conflicting evidence from single randomized trial or nonrandomized studies 	COR III: Harm	Excess Cost w/o Benefit or Harmful	Harmful to Patients
LEVEL C Very limited populations evaluated* Only consensus opinion of experts, case studies, or standard of care	<ul style="list-style-type: none"> Recommendation that procedure or treatment is useful/effective Only expert opinion, case studies, or standard of care 	<ul style="list-style-type: none"> Recommendation in favor of treatment or procedure being useful/effective Only diverging expert opinion, case studies, or standard of care 	<ul style="list-style-type: none"> Recommendation's usefulness/efficacy less well established Only diverging expert opinion, case studies, or standard of care 			
Suggested phrases for writing recommendations	should is recommended is indicated is useful/effective/beneficial	is reasonable can be useful/effective/beneficial is probably recommended or indicated	may/might be considered may/might be reasonable usefulness/effectiveness is unknown/unclear/uncertain or not well established	COR III: No Benefit		COR III: Harm
Comparative effectiveness phrases ¹	treatment/strategy A is recommended/indicated in preference to treatment B treatment A should be chosen over treatment B	treatment/strategy A is probably recommended/indicated in preference to treatment B it is reasonable to choose treatment A over treatment B		is not recommended is not indicated should not be performed/administered/other is not useful/beneficial/effective		potentially harmful causes harm associated with excess morbidity/mortality should not be performed/administered/other

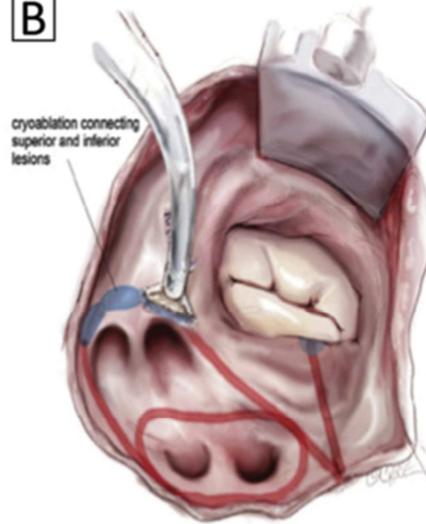
Left Atrial Lesion Set

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Sternotomy

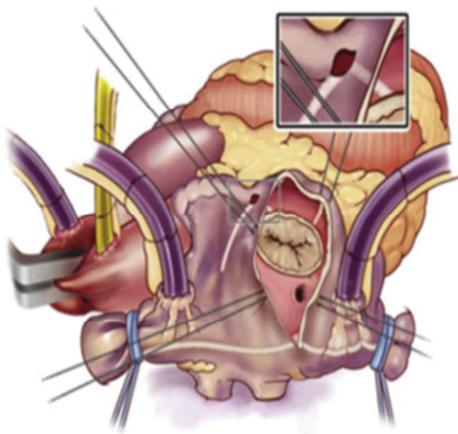
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Right Mini-thoracotomy

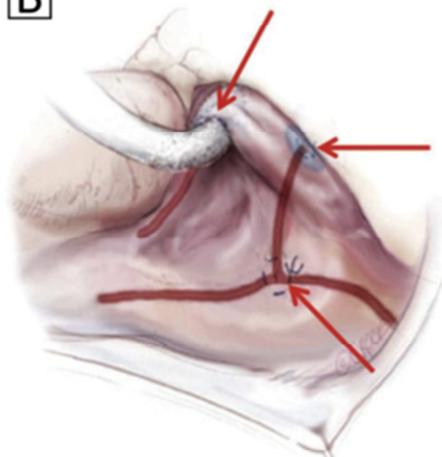
Right Atrial Lesion Set

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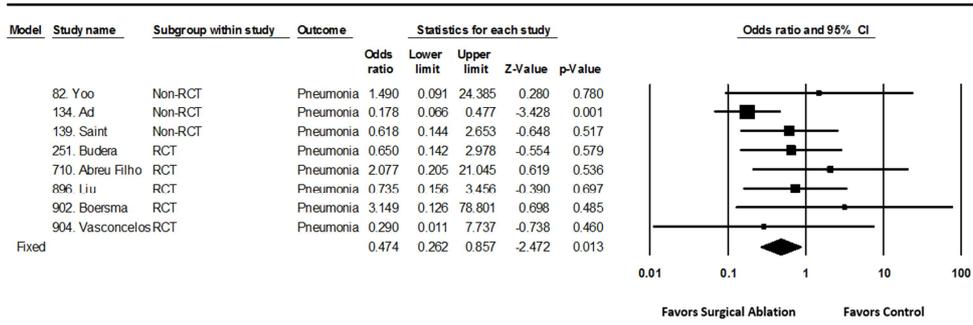


Sternotomy

B

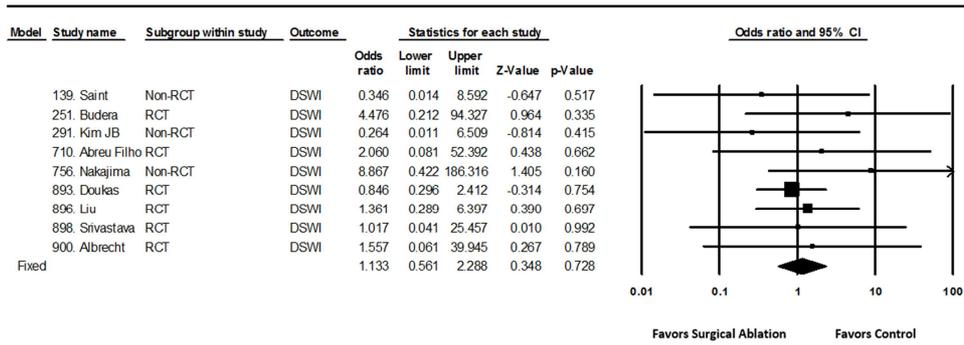


Right Mini-thoracotomy

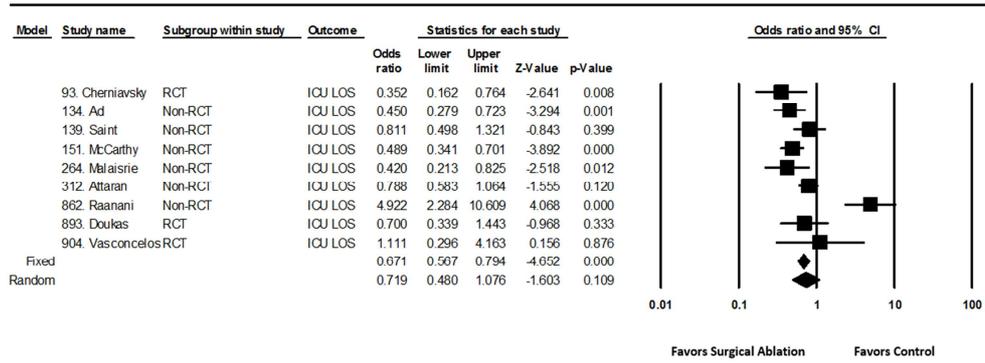


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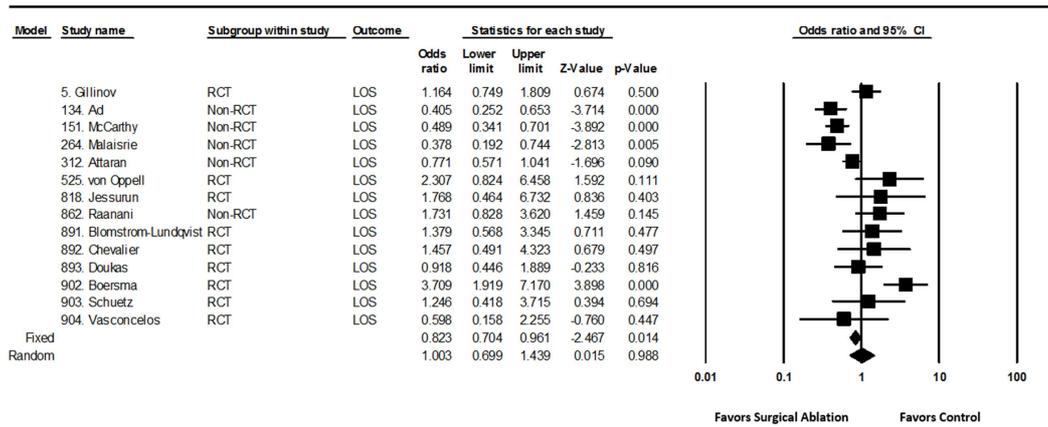
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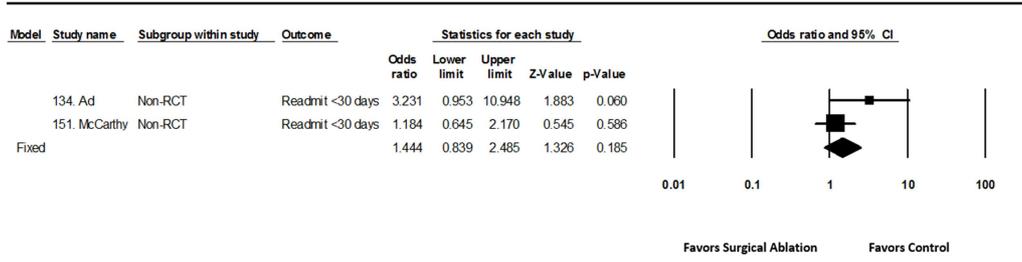
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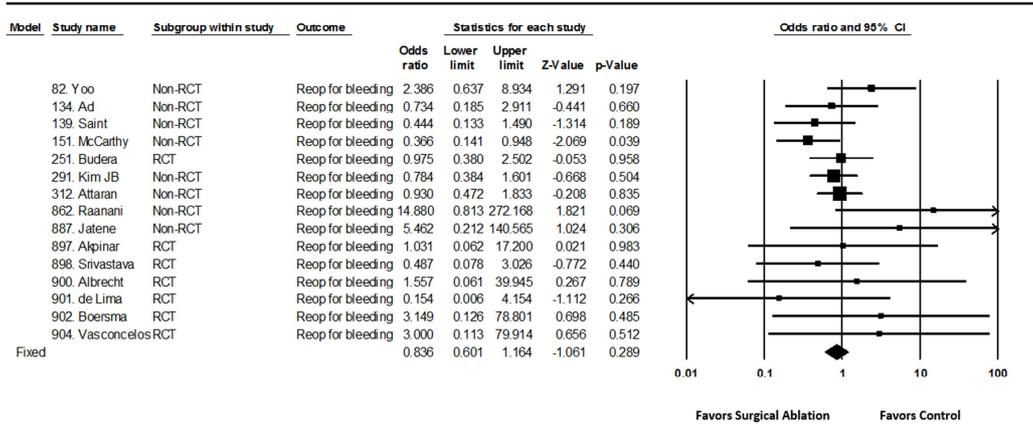


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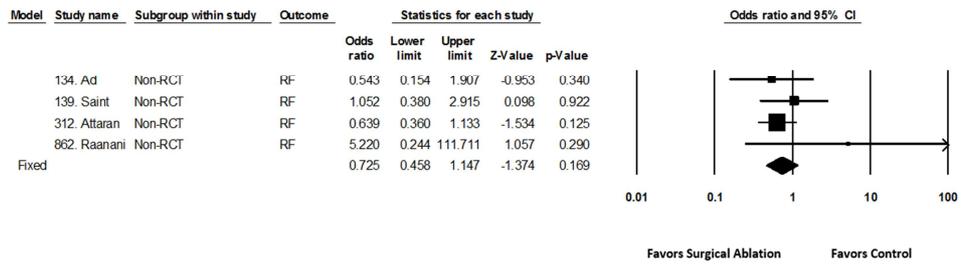


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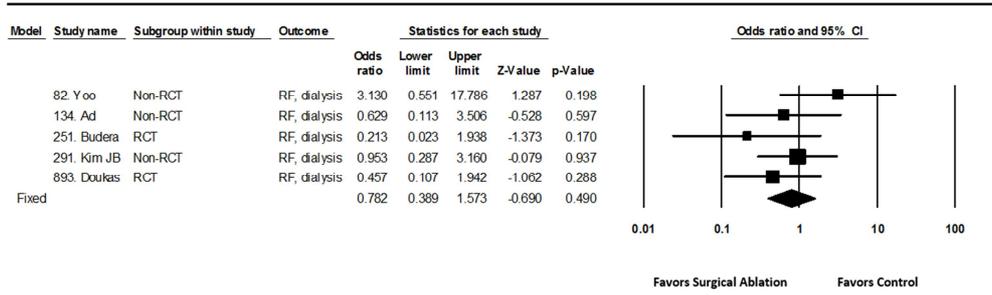
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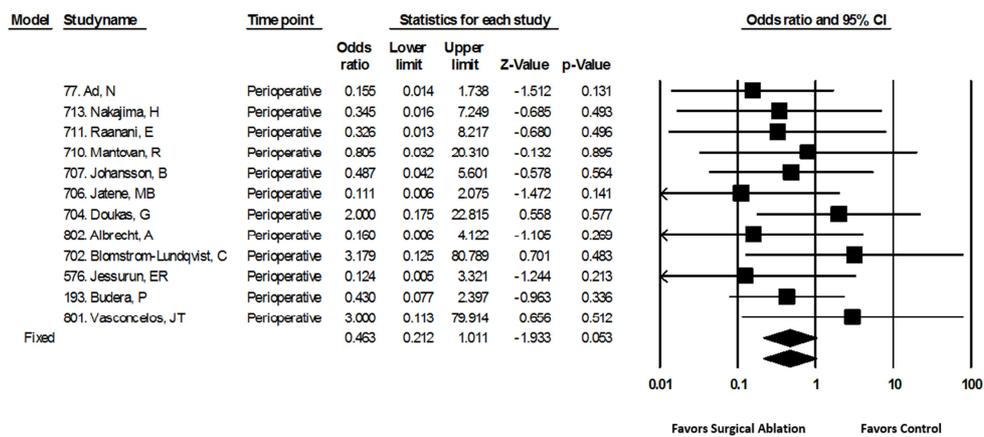
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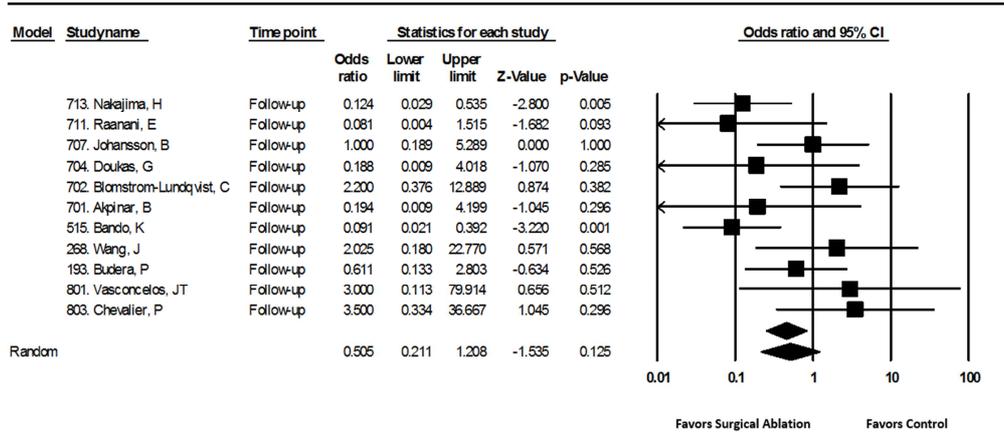
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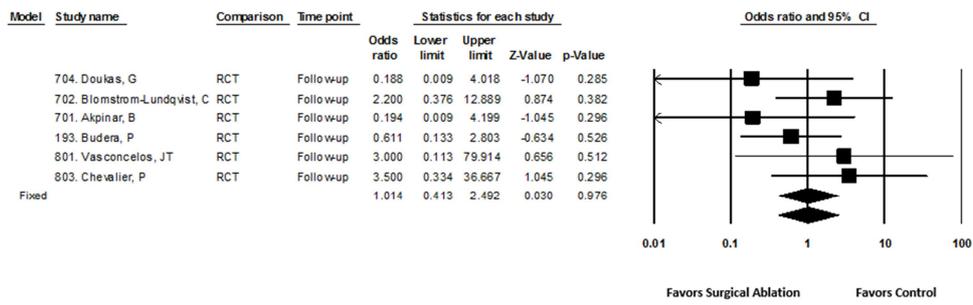
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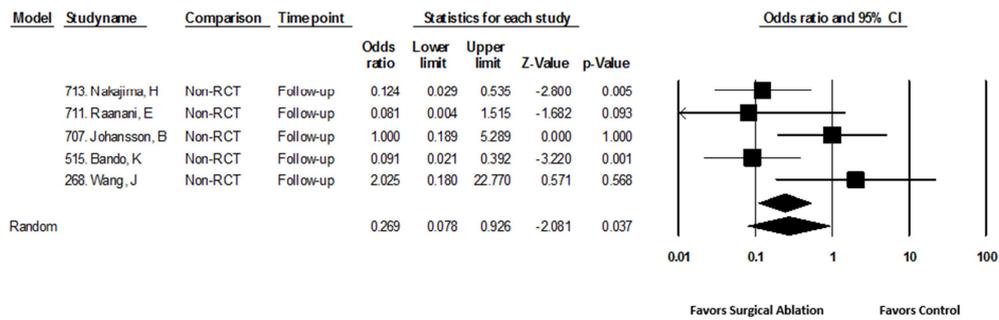
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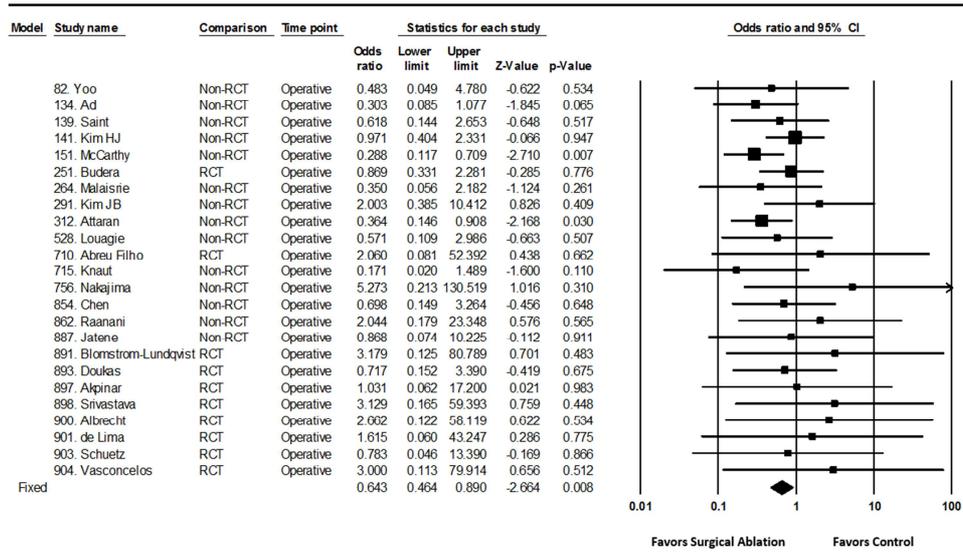
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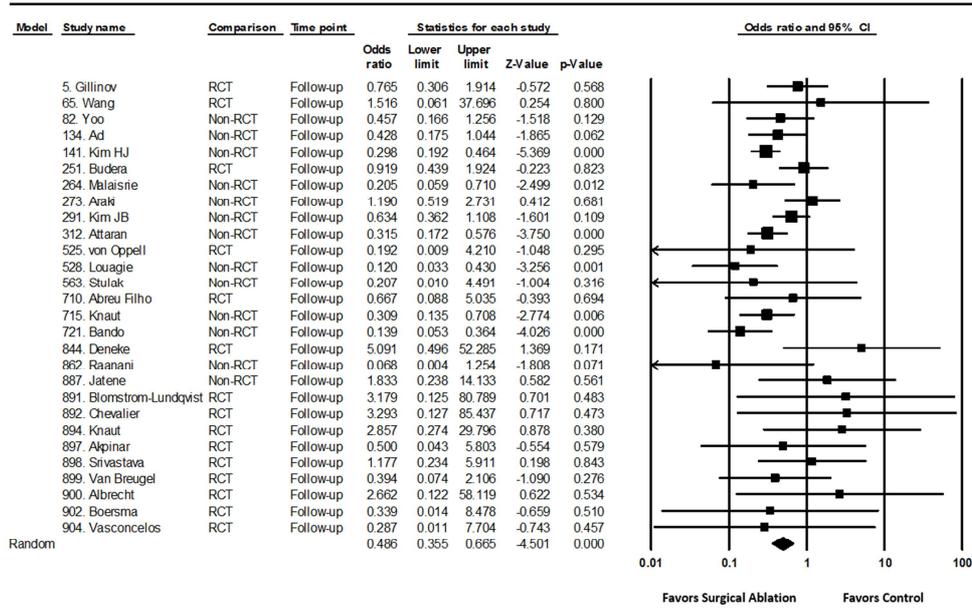
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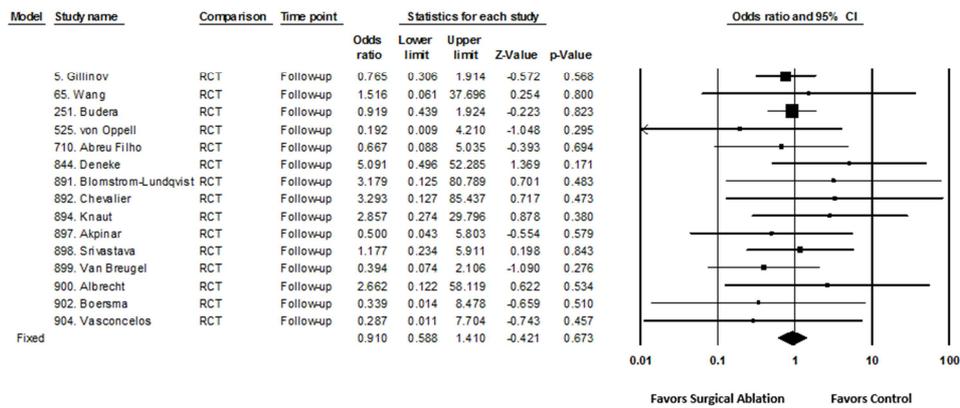


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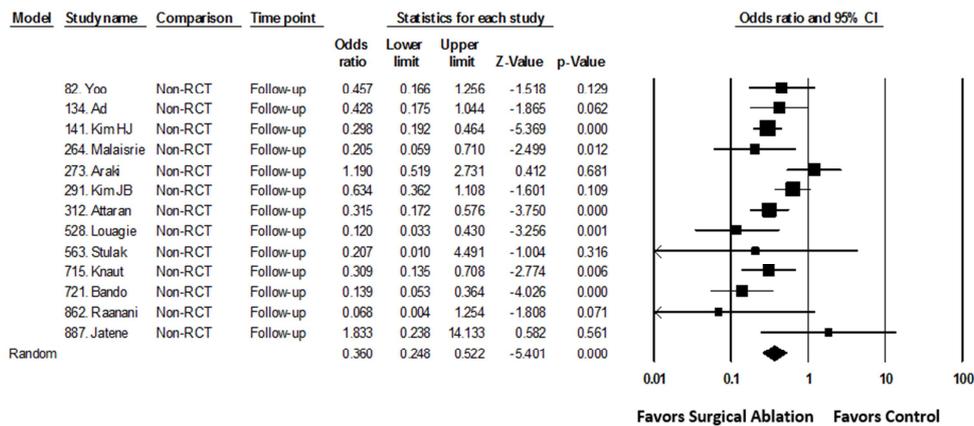
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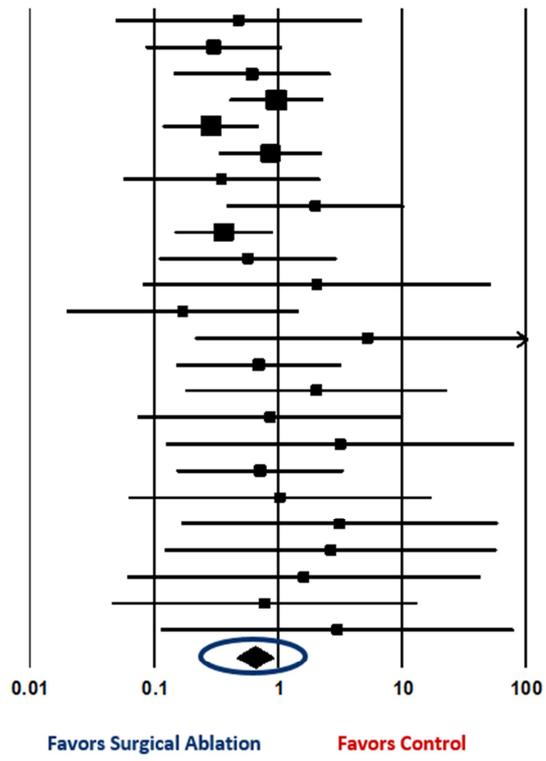
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