

## What is a Checklist?

- ✓ list of things to do
- ✓ list of items to verify, check or inspect
- ✓ list of required items or points to be considered
- ✓ comprehensive list of important or relevant actions, or steps to be taken

*"A checklist is a type of informational job aid used to reduce failure by compensating for potential limits of human memory and attention. It helps to ensure consistency and completeness in carrying out a task." - Wikipedia*

## Why Use Checklists?

- ✓ Increasing complexity of everything
- ✓ Memory and judgement are unreliable
- ✓ Human cognition (problem solving skills) degrade under stress & routine
- ✓ Greatly reduce avoidable (stupid) errors/mistakes
- ✓ Checklists have a proven track-record
- ✓ Allows for strategic thought

## What Makes a Checklist Good or Bad?

### Bad Checklists

- Vague/Imprecise
- Too long
- Hard to use/understand
- Impractical
- *Try to spell out every single step*

### Good Checklists

- Precise/Ultra-clear language
- Efficient/To the point
- Easy to use in real application (especially under difficult circumstances)
- *Do NOT spell out every single step - only the MOST critical steps*

### **Never Events (aka "Killer Items"):**

*Adverse events that are serious, largely preventable, and of concern to both the public and professionals for the purpose of public accountability. In other words, the kind of event that should never happen... but unfortunately do.*

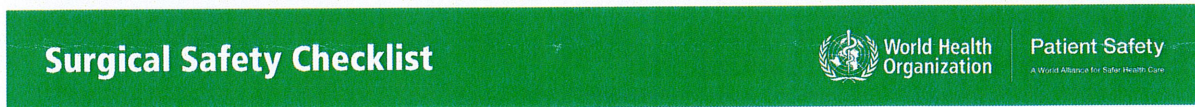


**Types of Checklists** (Source: Daniel Boorman - Boeing Electronic Checklist Procedure Manager)

1. Read-Do - Team members carry out tasks as they check them off (like a recipe)
2. Do-Confirm - Team members perform their jobs from memory and experience, but pause at critical points to make sure everything that should be done actually has been done.

**Making a Checklist**

- ✓ Wording & design must be simple
- ✓ Free of clutter (unnecessary logos, symbols, colors, etc.)
- ✓ Use upper and lowercase text
- ✓ San serif-style text are best (Arial or Helvetica **NOT** Times New Roman, Palatino, etc.)
- ✓ Fits on one page
- ✓ Must define clear pause points (when the checklist is to be used)
- ✓ Brief (5-9 items)
- ✓ Executable quickly (or people will begin shortcutting/skipping)
- ✓ Focus on “Killer Items”
- ✓ Must be tested in real world conditions!



Before induction of anaesthesia <small>(with at least nurse and anaesthetist)</small>	Before skin incision <small>(with nurse, anaesthetist and surgeon)</small>	Before patient leaves operating room <small>(with nurse, anaesthetist and surgeon)</small>
<p><b>Has the patient confirmed his/her identity, site, procedure, and consent?</b></p> <input type="checkbox"/> Yes	<p><input type="checkbox"/> <b>Confirm all team members have introduced themselves by name and role.</b></p> <p><input type="checkbox"/> <b>Confirm the patient's name, procedure, and where the incision will be made.</b></p> <p><b>Has antibiotic prophylaxis been given within the last 60 minutes?</b></p> <input type="checkbox"/> Yes <input type="checkbox"/> Not applicable	<p><b>Nurse Verbally Confirms:</b></p> <input type="checkbox"/> The name of the procedure <input type="checkbox"/> Completion of instrument, sponge and needle counts <input type="checkbox"/> Specimen labelling (read specimen labels aloud, including patient name) <input type="checkbox"/> Whether there are any equipment problems to be addressed
<p><b>Is the site marked?</b></p> <input type="checkbox"/> Yes <input type="checkbox"/> Not applicable	<p><b>Anticipated Critical Events</b></p> <p><b>To Surgeon:</b></p> <input type="checkbox"/> What are the critical or non-routine steps? <input type="checkbox"/> How long will the case take? <input type="checkbox"/> What is the anticipated blood loss?	<p><b>To Surgeon, Anaesthetist and Nurse:</b></p> <input type="checkbox"/> What are the key concerns for recovery and management of this patient?
<p><b>Is the anaesthesia machine and medication check complete?</b></p> <input type="checkbox"/> Yes	<p><b>To Anaesthetist:</b></p> <input type="checkbox"/> Are there any patient-specific concerns?	
<p><b>Is the pulse oximeter on the patient and functioning?</b></p> <input type="checkbox"/> Yes	<p><b>To Nursing Team:</b></p> <input type="checkbox"/> Has sterility (including indicator results) been confirmed? <input type="checkbox"/> Are there equipment issues or any concerns?	
<p><b>Does the patient have a:</b></p> <p><b>Known allergy?</b></p> <input type="checkbox"/> No <input type="checkbox"/> Yes	<p><b>Is essential imaging displayed?</b></p> <input type="checkbox"/> Yes <input type="checkbox"/> Not applicable	
<p><b>Difficult airway or aspiration risk?</b></p> <input type="checkbox"/> No <input type="checkbox"/> Yes, and equipment/assistance available		
<p><b>Risk of &gt;500ml blood loss (7ml/kg in children)?</b></p> <input type="checkbox"/> No <input type="checkbox"/> Yes, and two IVs/central access and fluids planned		

This checklist is not intended to be comprehensive. Additions and modifications to fit local practice are encouraged.

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