

## How to customize the Safe Surgery Checklist for your facility

**USE WHEN:** Your facility is introducing a surgical safety checklist for the first time.

This guide summarizes the steps to follow when customizing the checklist to meet your local needs. Use it as a reference as you lead your team through the checklist modification process.

### Prerequisite tasks

This procedure assumes that you have built an implementation team and completed an assessment of your current environment by direct observation of surgical teams and administration of a culture survey.

### Materials

- results of your culture survey
- results from your assessment of existing surgical workflow
- a copy of the Safe Surgery Checklist template
- a copy of the quick-reference guide *Rationale and origin of items on the Safe Surgery Checklist*
- a copy of the action guide *Checklist for customizing the Safe Surgery Checklist*

### Working with your implementation team, use the following process:

1. Review the results of your culture survey to identify gaps in teamwork and communications. Be sure to look at two key indicators:
  - the ability of people on your surgical teams to speak up and voice concerns
  - people's perceptions of how the checklist is used
2. As a team, review the rationale for each item on the Safe Surgery Checklist template (refer to the quick-reference guide *Rationale and origin of items on the Safe Surgery Checklist*). It is critical to understand why each item on the checklist has been included, before you evaluate potential changes.
3. Based on the information you collected while observing your current surgical workflow, identify gaps between your intended surgical workflow and existing practice.
4. Compare your existing processes with the Safe Surgery Checklist template and identify any differences or gaps that need to be addressed.
5. Based on those gaps, create a list of proposed changes to the checklist template and prioritize them according to their impact on patient safety and team communication.
6. Evaluate each proposed change to the template using the criteria and the six questions described in "Decide which items belong on your checklist" in Chapter 7. (The questions are also listed in the action guide *Checklist for customizing the Safe Surgery Checklist* in Chapter 7.) Determine the language you will use for any items to be added.
7. Make changes to the checklist template to create a draft checklist for your facility.
8. Conduct a tabletop simulation to test your work.
9. Continue to make changes and conduct tabletop simulations as needed until you are ready to test the checklist in a real case. (See Chapter 8: *Testing your checklist in the operating/procedure room.*)