

How to make improvements to your existing surgical checklist

USE WHEN: Your facility currently uses a safety checklist in the operating/procedure room.

This guide summarizes the steps to follow when revising or refining your surgical safety checklist. 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 checklist use
- results from your assessment of existing surgical workflow
- a copy of your existing surgical safety checklist
- 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
 - team members' 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*). Understanding why those items are included in the template can help you evaluate the items on your existing checklist.
3. Review the information you collected while observing your current surgical workflow and watching how teams use your existing checklist. Identify gaps between your intended surgical workflow and existing practice.
4. Compare your existing processes with your existing checklist items and the recommended items on the Safe Surgery Checklist template. Identify any gaps or opportunities.
5. Create a list of proposed changes to your checklist that might address the gaps, and prioritize the potential changes according to their impact on patient safety and team communication.
6. Evaluate each proposed change 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 your checklist.
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.*)