

Observer's guide for checklist testing

Use the following steps as a guide when observing initial testing of your customized checklist. Have a copy of the checklist for yourself so that you can follow along with the team.

BEFORE THE CASE

Explain your role

You are observing the team to learn how well the checklist works and to identify any potential improvements. Thank them for their willingness to help improve the checklist and make it work for their facility.

Do a “practice run” with the full surgical team

If possible, and if you haven't already done so, conduct a read-through of the checklist with the team before the first case and address any questions.

Make sure that every team member has access to a checklist

The checklist should be accessible to everyone in the room from their normal positions. Other team members can hold copies for the surgeon and scrub technician, if necessary.

DURING THE TEST

If the surgical team has questions or problems with the checklist, answer their questions or guide the team.

Ask *yourself* these questions as you watch the surgical team use the checklist:

- Are participants reading the checklist aloud from a paper copy?
- Do all team members introduce themselves and read their portion of the checklist?
- Are voiced concerns being acknowledged and discussed?
- Is each item being verified before the team moves on to the next checklist task?

IMMEDIATELY AFTER THE CASE

Ask the surgical team the following questions, document their comments, and create action items for follow-up.

Ask the surgical team:

- How did it go?
- Did the checklist items get your team to talk about everything that you needed to share with each other?
- Is there anything that should be on the checklist that is not currently there?
- Is there redundancy?
- Are the checklist items worded clearly?
- Were the checklist items easy to read and follow?
- Did the appropriate information get shared with the surgical team members and at the “right” times?
- Is there anything on this checklist that should be removed?

If the surgical team has used the checklist the entire day, ask:

- How did it feel to use the checklist for every case?

Be sure to thank the team, document the team's comments, and create action items for follow-up.