Checklists

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Checklists are cognitive aids used in medicine to ensure consistent performance of multi-step tasks. They help practitioners complete each critical step in the proper order. Often, their greatest value is found in tasks with high stress (emergency protocols), high complexity (escalating anti-hypertensive drug doses), high consequence (wrong side surgery), or low frequency (sexual assault forensic exam).

Using checklists is not "cookbook" medicine. Rather, checklists are tools that free the clinician's attention to focus on the individualized aspects of the case. Just as we compute methotrexate doses with calculators and review anatomical illustrations prior to surgery, so too should we use checklists to ensure we consistently and accurately perform clinical tasks.

Like any effective tool, checklists need a methodical implementation plan. Components of a successful checklist roll-out include elements such as:
- development and critique by the front-line users,
- champions at all levels of organizational leadership to demonstrate support and commitment to the checklist, and
- practice in how to employ the checklist, such as during simulation drills.

Practitioners can develop personal checklists to promote patient safety and shared mental models. For example, prior to a cesarean delivery, additional reminders to include during the huddle/ time out might address:
- Having an awake patient and partners, so caution with conversations.
- Using closed loop communication for additional medication requests.
- Ensuring one unscrubbed person in the OR at all times.
- Notifying the surgical team before anesthesia/ nursing team turnovers.
- Ensure a hysterectomy set is available in case of complications.
- Alerting the team to ANY concerns immediately, not after the case.

Examples of existing clinical checklists include:
- The Joint Commission's Universal Protocol Checklist, available from https://www.jointcommission.org/standards/universal-protocol/. Once on the web page, scroll down and click on the "Download the Universal Protocol" button.
- Operating room crisis checklists from Ariadne Labs, a joint center for health systems innovation at Brigham and Women's Hospital and the Harvard T. H. Chan School of Public Health https://www.ariadnelabs.org/safe-surgery-safe-systems/surgical-safety/or-crisis-checklists/. Free registration is required.
- The Obstetrics Checklist App from the Uniformed Services University (USU). Go to the App Store, search "Ob Emergencies", and identify the USU logo. Free download. Not available for android devices.

Additional Reading

"Primer on Patient Safety and Healthcare Quality for Maternal-Fetal Medicine Fellows". Patient Safety & Quality Committee and Fellowship Committee, Society for Maternal Fetal Medicine, Washington, D.C. 2023.

Haugen, A. S., Sevdalis, N., & Søfteland, E. (2019). Impact of the World Health Organization surgical safety checklist on patient safety. Anesthesiology, 131(2), 420-425.

Fan, Linda L. MD; Sheth, Sangini S. MD, MPH; Pettker, Christian M. MD. Pilot Implementation of a Health Equity Checklist to Improve the Identification of Equity-Related Adverse Events. Obstetrics & Gynecology 140(4):p 667-673, October 2022.