

A CHECKLIST FOR CHECKLISTS

Development

- Do you have clear, concise objectives for your checklist?

Is each item:

- A critical safety step and in great danger of being missed?
- Not adequately checked by other mechanisms?
- Actionable, with a specific response required for each item?
- Designed to be read aloud as a verbal check?
- One that can be affected by the use of a checklist?

Have you considered:

- Adding items that will improve communication among team members?
- Involving all members of the team in the checklist creation process?

Drafting

Does the Checklist:

- Utilize natural breaks in workflow (pause points)?
- Use simple sentence structure and basic language?
- Have a title that reflects its objectives?
- Have a simple, uncluttered, and logical format?
- Fit on one page?
- Minimize the use of color?

Is the font:

- Sans serif?
- Upper and lower case text?
- Large enough to be read easily?
- Dark on a light background?

- Are there fewer than 10 items per pause point?

- Is the date of creation (or revision) clearly marked?

Validation

Have you:

- Tried the checklist with front line users (either in a real or simulated situation)?
- Modified the checklist in response to repeated trials?

Does the checklist:

- Fit the flow of work?
- Detect errors at a time when they can still be corrected?
- Can the checklist be completed in a reasonably brief period of time?
- Have you made plans for future review and revision of the checklist?

Please note: A checklist is NOT a teaching tool or an algorithm