### A CHECKLIST FOR CHECKLISTS

#### Development

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

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

#### Drafting

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

- Is the font:
  - Sans serif?
  - Sans serif?
  - Upper and lower case text?
  - Upper and lower case text?
  - Large enough to be read easily?
  - Large enough to be read easily?
  - Dark on a light background?
  - 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:
  - Trialed the checklist with front line users (either in a real or simulated situation)?
  - Trialed the checklist with front line users (either in a real or simulated situation)?
  - Modified the checklist in response to repeated trials?
  - Modified the checklist in response to repeated trials?

- Does the checklist:
  - Fit the flow of work?
  - Fit the flow of work?
  - Detect errors at a time when they can still be corrected?
  - 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?

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

Last updated 1/14/10