

## TITLE

**SAFE SURGERY CHECKLIST: DEVELOPING ALTERNATE VERSIONS**

## DOCUMENT #

PS-04-01

## INITIAL APPROVAL DATE

November 1, 2011

## PARENT DOCUMENT LEVEL

LEVEL 1

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Safe Surgery Checklist Policy

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May 23, 2014

## APPROVAL LEVEL

Chief Executive Officer

## NEXT REVIEW

May 23, 2017

## SPONSOR

Surgery Strategic Clinical Network

## CATEGORY

Patient Safety

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If you have any questions or comments regarding the information in this procedure, please contact the Policy & Forms Department at [policy@albertahealthservices.ca](mailto:policy@albertahealthservices.ca). The Policy website is the official source of current approved policies, procedures and directives.

**OBJECTIVES**

- To provide clear guidance for the development and implementation of an alternate version of the ***Safe Surgery Checklist***.
- To ensure that minimum requirements are preserved on all alternate versions of safe surgery checklists.

**APPLICABILITY**

Compliance with this procedure is required by all Alberta Health Services employees, members of the medical and midwifery staffs, students, volunteers, and other persons acting on behalf of Alberta Health Services (including contracted service providers as necessary). This procedure does not limit any legal rights to which you may otherwise be entitled.

Clinical Operations Executive Committee (COEC) endorsed full compliance with the Alberta Health Services *Safe Surgery Checklist* policy, to which this procedure is subordinate.

**PROCEDURE****1. Requirements for the Development of Alternate Versions of the *Safe Surgery Checklist***

- 1.1 When developing alternate versions of the *Safe Surgery Checklist*, site-based operational working groups shall comply with the objectives of the World Health Organization (WHO) *Ten Essential Objectives for Safe Surgery*.

- 1.2 Removal of any heading from the approved *Safe Surgery Checklist* is not permitted.
- 1.3 Alternate, approved versions of the *Safe Surgery Checklist* shall include surgical-briefing, surgical-time-out, and surgical-debriefing sections.

## 2. Developing and Implementing an Alternate Version of the *Safe Surgery Checklist*

- 2.1 On identified need, Alberta Health Services facilities and contracted non-hospital surgical facilities may choose to develop, trial, implement and evaluate an alternate version of the *Safe Surgery Checklist* to enhance **patient** safety, improve the flow of **surgical interventions** and promote effective communication within the **surgical team**.
  - a) Site, Zone or specialty administrative approval for development is required before proceeding.
- 2.2 Programs shall submit a request to develop alternate versions of the *Safe Surgery Checklist*, with rationale, to the Alberta Health Services Surgery Strategic Clinical Network. (See Alberta Health Services *Safe Surgery Checklist Alternate Version Request for Approval*.)
- 2.3 Approval from the Surgery Strategic Clinical Network shall be obtained prior to the alternate checklist being implemented. (Refer to the *SSC Alternate Version Development Process Flowchart*.)
- 2.4 A site-based operational working group shall develop, trial, implement and evaluate the alternate version of the *Safe Surgery Checklist*, ensuring that all members of the multidisciplinary surgical team, including surgeons, anesthesiologists, technicians, nurses and support staff, are involved in the process.
  - a) First, review the Alberta Health Services *Safe Surgery Checklist* Policy and Section 1 of this procedure.
  - b) Next, request a review by both Alberta Health Services Quality & Healthcare Improvement, Accreditation, and Policy departments.
  - c) Then, submit draft alternate versions of the *Safe Surgery Checklist*, with rationale, to the Alberta Health Services Surgery Strategic Clinical Network for review.
    - The Surgery Strategic Clinical Network is responsible for reviewing all alternate versions of the *Safe Surgery Checklist* and shall ensure that all approved alternate versions of the *Safe Surgery Checklist* comply with the requirements outlined within this procedure.

- 2.5 Approved, alternate versions of the *Safe Surgery Checklist* shall be trialed and evaluated in simulated, and then real-life, situations in the surgical environment.
- a) Evaluation of the alternate *Safe Surgery Checklist* shall be completed and reported to the Surgery Strategic Clinical Network.
  - b) The Surgery Strategic Clinical Network then shall share information about the alternate *Safe Surgery Checklist* with Zone Implementation Leads.
- 2.6 When required, facilities and contracted facilities undertaking surgical interventions may seek assistance with the development, trial, implementation and evaluation of alternate versions of the *Safe Surgery Checklist* through the local clinical quality consultants (accessible at site and Zone levels).

## DEFINITIONS

**Patient** means an adult or child who receives or has requested health care or services from Alberta Health Services and its health care providers or individuals authorized to act on behalf of Alberta Health Services. This term is inclusive of residents, clients and outpatients.

**Safe Surgery Checklist** means an Alberta Health Services approved safe surgery checklist.

**Surgical intervention** means interventions that require at least one of the following:

- a major anesthetic, regardless of where they are provided (major anesthetics include general, spinal and epidural, but not local); or
- an incision below the skin or eye into the underlying body structure or cavity; or
- a major anesthetic and fully equipped and staffed operating room, due to the condition or age of the patient.

**Surgical team(s)** means Alberta Health Services employees, and other persons acting on behalf or in conjunction with Alberta Health Services, including surgeons, anaesthesiologists, nurses, technicians, and other support staff involved in surgical interventions.

## REFERENCES

- Alberta Health Services *Safe Surgery Checklist* policy
- World Health Organization (WHO) *Ten Essential Objectives for Safe Surgery*
- Accreditation Canada Qmentum Program - *Operating Rooms*
- Alberta Health and Wellness AWR Release 3.0, Version 6.7, February 2006
- Alberta Health Services *Safe Surgery Checklist*
- Alberta Health Services *Safe Surgery Checklist Alternate Version Request for Approval*
- *SSC Alternate Version Development Process* Flowchart

## REVISIONS

May 23, 2014