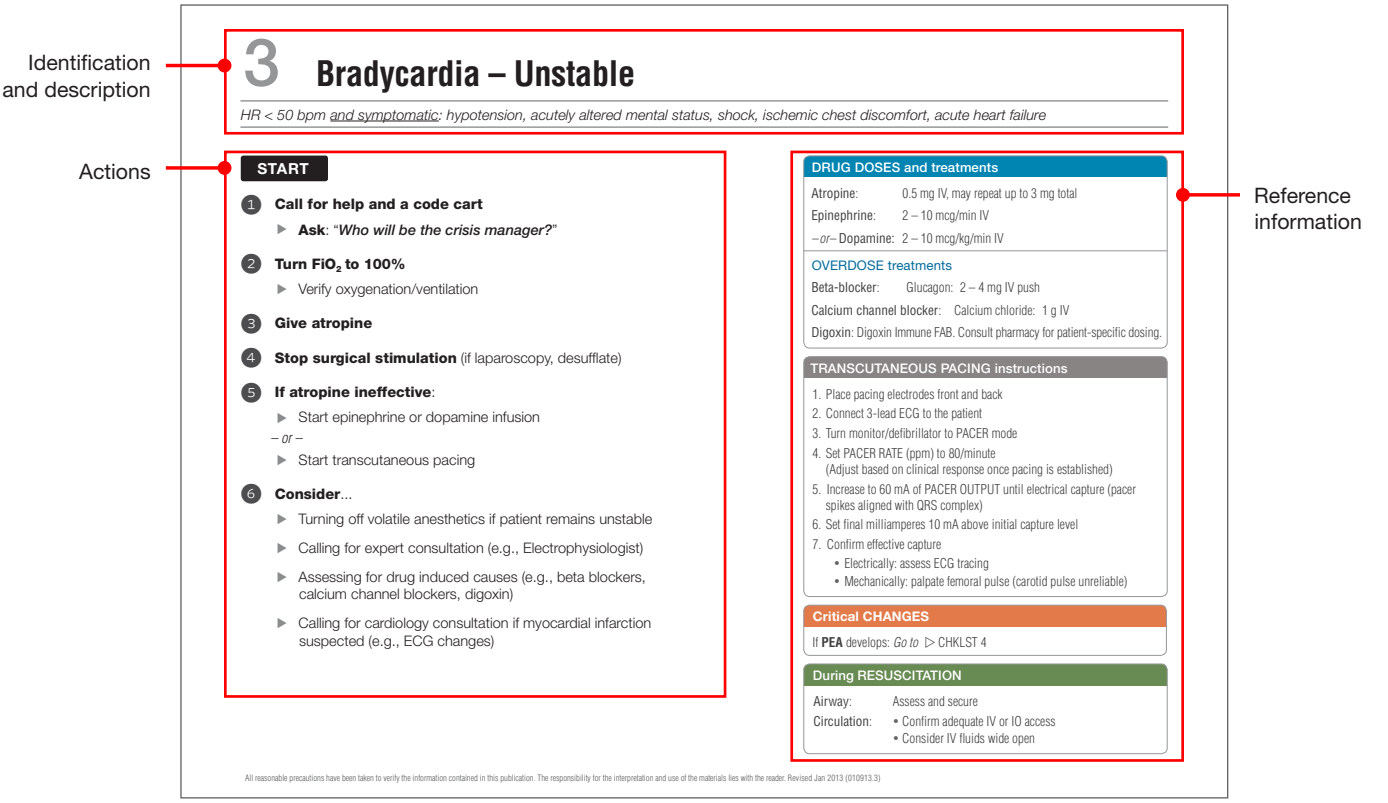
Design notes

CHECKLIST DESIGN AND LAYOUT

The Operating Room Crisis Checklists are designed to be easy to use in a crisis situation. This document summarizes the design features our team adopted. Understanding these features will help your organization successfully adapt or enhance the checklists to meet your needs.



Identification

- Checklist number
- Suspected event (checklist name)
- Diagnostic description

Actions

Actions are intended to be read aloud and use language that is easy to say. The layout of action steps varies based on complexity, the need for branching logic, and the amount of content. However, common elements are:

- "START" label gives users a clear focal point for action
- Top-level items are sequenced to provide structure
- Bold text is used for key items to facilitate scanning
- Indents visually group sets of related tasks/considerations
- Cross-references between checklists are identified by symbol and unique styling

Reference information

This section provides additional information that might be helpful (e.g., drug dosages, equipment instructions, etc.).

Boxed by type of content and color coded to aid differentiation:

- Drug doses and notes
- CPR and resuscitation
- Equipment instructions
- Critical changes
- Other reference info

Design notes

ORGANIZATION

Checklists are alphabetized and numbered sequentially, based on the name of the suspected event, so that it is easy to find the correct checklist.

COLOR

Color coding is used in the checklist set to differentiate reference content *within* a checklist (e.g., drug doses appear in a blue box). This is intended to help users rapidly navigate from action steps to reference information as needed.

Color, once assigned a meaning, should not be used for another purpose in the same materials. To prevent confusion, color should not be used to distinguish *between* checklists (i.e., avoid colored tabs).

Legend of reference content

- Drug doses and notes
- CPR and resuscitation
- Equipment instructions
- Critical changes
- Other reference info

TYPE

Helvetica and Helvetica Condensed are used throughout. Font size, style, and weight are varied to visually distinguish different types of information and to fit content on the page. Text additions should be consistent with the existing type style for similar information.

PAPER

A bright white, uncoated heavy-weight paper is recommended (e.g., 80 lb or 100 lb cover stock). The bright white will help optimize readability with maximum contrast. A coated paper may create glare in OR lighting conditions. If the checklists will be used in a binder, lamination and/or hole reinforcements will reduce the potential for tearing during use.

TIPS FOR MODIFICATION

Modifying some of the checklist items may be important for your facility. For example, the defibrillator settings or pacing defibrillator settings that are included in the checklists are general instructions, but you may want to include your machine-specific instructions. You may also want to include phone numbers that are specific to your facility.

When modifying checklists for local practice or equipment, consider the following:

- Carefully evaluate any additions in terms of their impact on usability: *Does the benefit of new information outweigh the cost in added complexity?*
- Use short, direct, unambiguous statements that are easy to say out loud.
- Streamline actions by using the fewest, most important steps.
- Follow established conventions for color, type, and organization if possible.
- Make text as large as possible, consistent with established styles.
- Do not add colored text or tabs; color coding is already used to identify reference information.
- Boxes, arrows, or other graphics make a checklist more visually complicated; add them only if needed to prevent confusion and use a light color to minimize distraction.
- Conserve white space when possible.

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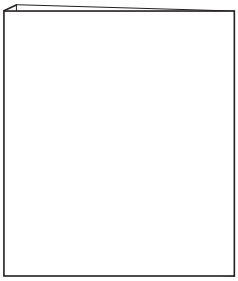
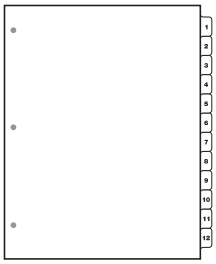
TIPS FOR USE IN A BINDER



BINDER

Use any standard 3-ring binder. A “view” binder includes a slit on the cover through which a cover page may be inserted. A smaller size spine, ½-inch or ¾-inch, may be most convenient.



NUMBERED TABS

Black and white tabs are recommended. Color coding is used to differentiate content *within* each checklist.

Sets of numbered 12-tab sets are commercially available (e.g., Avery® 12-Tab Ready Index® Classic Black & White Table of Contents Dividers model 11140, or similar).

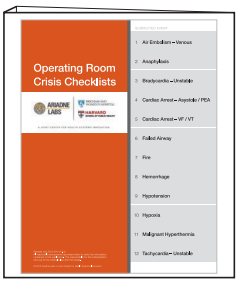
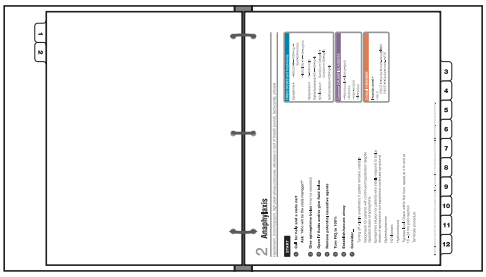


TABLE OF CONTENTS / SUSPECTED EVENTS
The supplied Table of Contents may be used as the exterior cover of the binder as well as the first page inside the binder.



CHECKLISTS
Checklists will be in landscape orientation when inserted.