



CROSS-CHECK: A multi-centre CROSS-sectional study and audit of surgical safety CHECKlist Modification

Collaborator Guidelines

Background

The World Health Organisation (WHO) surgical safety checklist is a 19-point checklist that is used worldwide in an effort to reduce surgical errors and adverse events. In the UK, completion of the checklist is mandated for every surgical and invasive procedure¹.

The checklist was designed as a template which could be modified for every surgical environment. Adaptation of the checklist to suit local requirements is an important step in optimising checklist buy-in and performance. Further adaptation in response to local or national patient safety incidents is also recommended¹. However, over-modification could have a negative impact on checklist utility, communication and teamwork, and should be done in accordance with the WHO guidelines².

Little is known about the extent of checklist modification in the United Kingdom and the extent to which modifications abide by WHO and NICE guidelines for checklist modification.

Study aim

To investigate the extent, nature and process of WHO Surgical Safety Checklist modification in the United Kingdom.

Study protocol

The study will be led by the Human Factors in Surgery Network (HFSN) and will utilise a trainee collaborative model for data collection. All UK NHS Trusts/Boards (Health &

Social Care Trusts in Northern Ireland) in which surgical and/or invasive procedures are undertaken will be eligible for the study. The study will consist of 3 elements:

- 1) **Audit** of WHO surgical checklist use and modification
- 2) **Cross-sectional study** comparing checklist content and modifications with the WHO Surgical Safety Checklist 2009
- 3) **Survey** relating to the checklist governance and the *process* of checklist modification in UK NHS hospitals

Study methods

Local collaborators will be recruited from UK hospitals and will be required to:

- 1) Obtain and submit copies of all WHO surgical safety checklist(s) used in their local Trust/Board.
- 2) Obtain a completed Checklist Governance Survey from a member of the Trust/Board Clinical Governance Committee.

Further information and guidance on how to obtain the above data will be provided after sign-up. The data from the checklist and survey will be analysed by the steering committee. Local collaborators will also be encouraged to audit their local checklist(s) and guidance will be provided by the steering committee.

Ethics & audit registration

- As per the University of Oxford research classification committee, ethical approval is not required as this is a clinical audit and no patient information will be requested.
- However, local collaborators are required to register the project as an audit with their local audit/quality improvement team (Note: not required at the time of application, but will be required when submitting data for analysis).

How to Get Involved?

Inclusion Criteria

- Trainee doctors, consultants, associate specialist doctors, advanced or surgical care practitioners, research nurses and medical students working in UK NHS hospitals are eligible to apply to become a CROSS-CHECK local collaborator.
- The trust/healthcare board within which the local collaborator works must perform surgical and/or invasive procedures.
- Collaborators must seek approval of a local consultant supervisor prior to application.

- We are welcoming **ONE** local collaborator **per NHS trust/Board** (please see our website for details of trusts which already have assigned local collaborators).

Consultant Supervisors

- Any consultant working in the same trust can be a consultant supervisor for a local collaborator.
- However, where possible, we recommend approaching a consultant with an interest in clinical governance as they may be based placed to help support the study and assist with contacting the hospital clinical governance committee in order to obtain a completed Checklist Governance Survey.
- For example:
 - o Head of clinical governance for surgery or anaesthesia
 - o Departmental clinical governance lead

What's in it for me?

*Collaborators who submit their hospital's WHO surgical safety checklists **AND** a completed Checklist Governance Survey will receive collaborator status and be **named as a collaborative author on all publications.***

- Collaborators who do not meet both criteria will be acknowledged in the manuscript but will not receive collaborator status.
- Consultant supervisors are also eligible for collaborative author status.
- We encourage presentation of audit findings at local audit and research meetings. Further guidance will provided by the steering committee.

Important dates

*Registration will open in **March 2025** and close on **1st June 2025**.
Surveys and checklists must be submitted by **31st July 2025**.*

How to sign up?

- Please fill in some basic details using the link below and a member of our team will be in touch with further information.
- Please read all the information in this document before registration. Further information can be found on the [HFSN website](#).

Register here:

<https://humanfactorsinsurgery.net/cross-check-project/>

Contact Information

For further information including FAQs and contact details please visit the HFSN website.

Thank you on behalf of the HFSN and CROSS-CHECK steering committee.

References:

- 1) NICE guidelines [NG180 1.4.8]
- 2) The WHO Surgical Safety Checklist: Adaptation Guide