YOUR EXPECTATIONS FOR THIS TRAINING

Directions: Picture yourself at the end of this training. It has been a successful and worthwhile experience for you because you have learned new information. Make a note of two things you hope to learn and take with you from this training.

1

2

You have just listed your expectations for this training! Now share these with the whole group so that the training facilitator(s) can either address your expectations during the training or refer you to appropriate print and Web-based resources as well as additional training, if appropriate.
OBJECTIVES OF TEAM STEPPS TRAINING FOR PRIMARY CARE OFFICE-BASED TEAMS

At the end of this training, participants will be able to

☐ Discuss the TeamSTEPPS framework and key principles;
☐ Define the four core team skills;
☐ Describe three leadership techniques;
☐ Describe two situation monitoring techniques;
☐ Describe six mutual support techniques;
☐ Identify common approaches to conflict management;
☐ Describe three communication techniques;
☐ Describe observable behaviors for each of the key TeamSTEPPS terms;
☐ Identify barriers to teamwork, strategies to overcome teamwork barriers, and potential successful outcomes.
## SAMPLE AGENDA

*(Note to trainer: Adapt this sample agenda to suit your needs and available time.)*

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Welcome, Introductions, Objectives, Agenda</td>
</tr>
<tr>
<td></td>
<td>Introduction to Team STEPPS</td>
</tr>
<tr>
<td></td>
<td>Leadership</td>
</tr>
<tr>
<td></td>
<td>Break</td>
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<tr>
<td></td>
<td>Situation Monitoring</td>
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<tr>
<td></td>
<td>Break</td>
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<tr>
<td></td>
<td>Mutual Support</td>
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<tr>
<td></td>
<td>Break</td>
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<tr>
<td></td>
<td>Communications</td>
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<tr>
<td></td>
<td>Tying it All Together</td>
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<td></td>
<td>Wrap-up and Evaluation</td>
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</tbody>
</table>
THINKING ABOUT YOUR PRIMARY CARE OFFICE-BASED TEAM

Directions: Take 2 or 3 minutes to respond to the following questions about your own primary care office-based team.

1. List the members of your primary care office-based team by position title.
   a. Who fills the role of physician? ________________________________
   b. Who fills the role of clinician? ________________________________
   c. Who fills the role of clinical support staff? ________________________
   d. Who fills the role of receptionist/administrative staff? ________________
   e. Who fills the role of ancillary support staff? ________________________
   f. What are the other roles in your team and who fills them? ________________

2. When do members of your team interact? How frequently?
   __________________________________________________________________
   __________________________________________________________________

3. How does your team exchange critical patient information? What is the quality of that information exchange? Do team members have enough information to do their jobs and to ensure patient safety?
   __________________________________________________________________
   __________________________________________________________________

4. What changes might your team consider to improve its exchange of patient information?
   __________________________________________________________________
   __________________________________________________________________
**VIDEO REFLECTIONS**

**Directions**
As you view the video, make a note of your thoughts and observations. What problems do you see occurring? Where do you see breakdowns in the process of providing quality patient care? How could the breakdowns have been avoided?

As you identify breakdowns, consider for each whether it falls under the TeamSTEPPS component of leadership, communication, situation monitoring, or mutual support and place a check (✓) under the appropriate column.

<table>
<thead>
<tr>
<th>Problem or Breakdown You Observe</th>
<th>Leadership</th>
<th>Communication</th>
<th>Situation Monitoring</th>
<th>Mutual Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<td>2.</td>
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<td>4.</td>
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<td>5.</td>
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</tbody>
</table>
When and Why To Use a Huddle

Directions:
Think about a situation in your medical office in which the team leader should have called a huddle, but did not. What were the results? Be prepared to share your example with the larger group.
**CROSS-MONITORING**

**Directions:** Find a partner. Suggest two examples: one of a situation in which cross-monitoring was successful for your team, and one in which cross-monitoring should have been used, but was not. What was the result? Be prepared to share your examples with the larger group.

<table>
<thead>
<tr>
<th>Situation in which Cross-Monitoring was Successful for My Team</th>
<th>Situation in which My Team Should Have Used Cross-Monitoring, But Did Not. Result?</th>
</tr>
</thead>
<tbody>
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</table>
**MUTUAL SUPPORT BEHAVIORS**

*Directions:* Form a small group of three or four people. In your group, identify types of behavior that might constitute mutual support, or team back-up behavior. Generate a list of as many of these behaviors as you can in five minutes. Be prepared to share your list with the larger group.

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H-8
CREATING A HANDOFF CHECKLIST

Directions: Form a small group. If your medical team members are present, form a group of your medical office team members and develop a handoff checklist based on the needs of your particular medical office. Think about how your team is unique, and keep in mind the core components of TeamSTEPPS. You have 10 minutes to develop your team’s handoff checklist. Be prepared to share your checklist with the larger group.

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