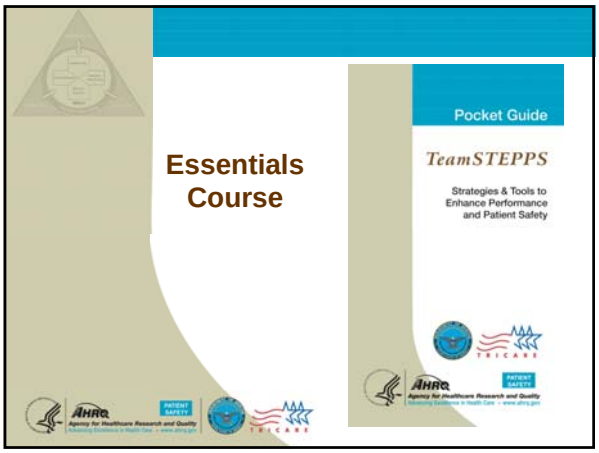
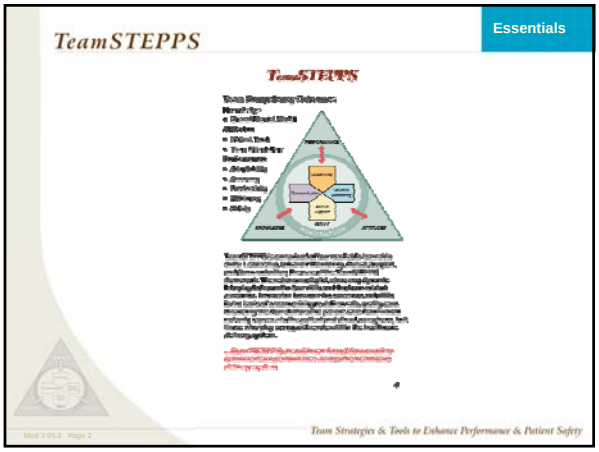
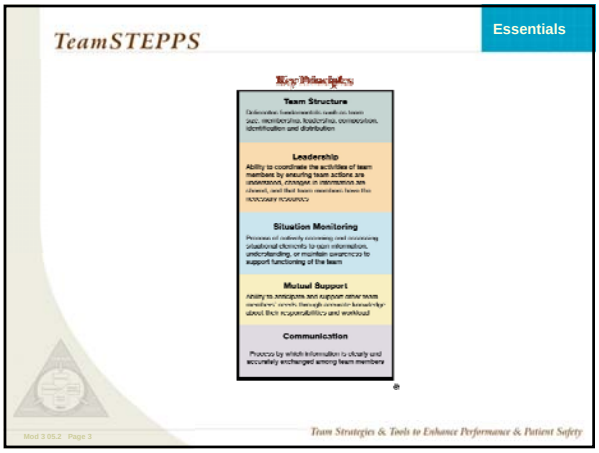
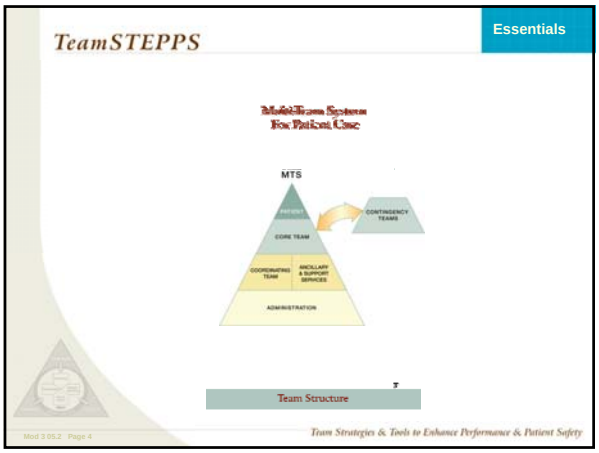
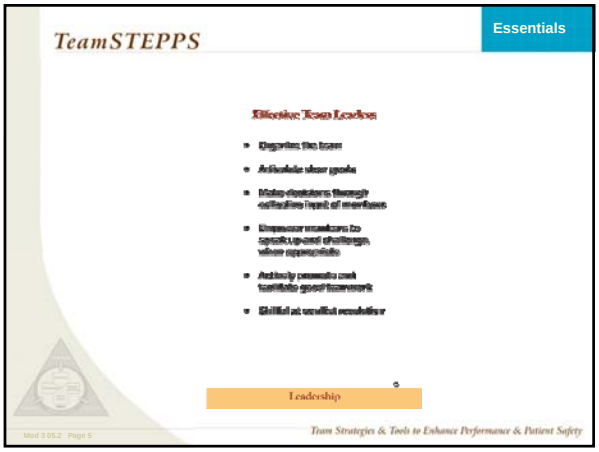
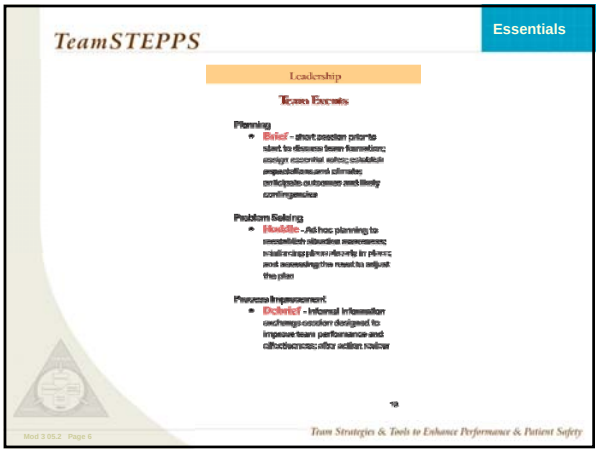

Essentials
Course
Pocket Guide
TeamSTEPPS
Strategies & Tools to
Enhance Performance
and Patient Safety

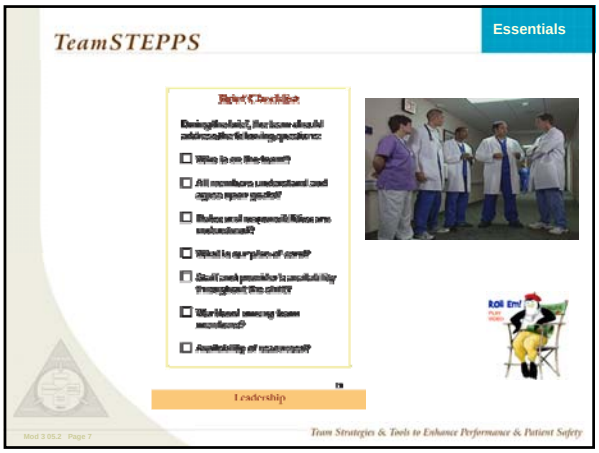

TeamSTEPPS
Essentials
Team Strategies & Tools to Enhance Performance & Patient Safety

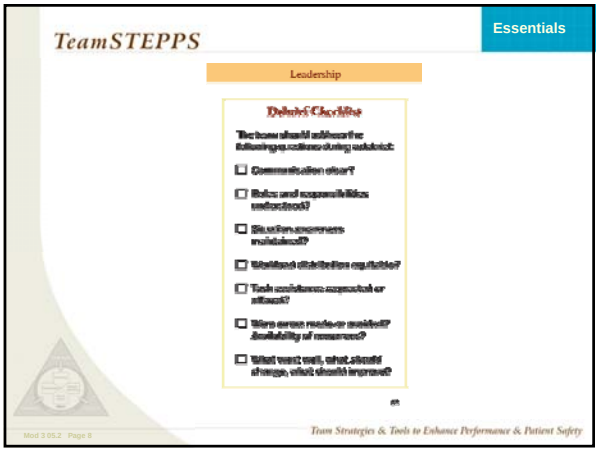

TeamSTEPPS
Essentials
Team Structure
Leadership
Situation Monitoring
Mutual Support
Communication
Team Strategies & Tools to Enhance Performance & Patient Safety

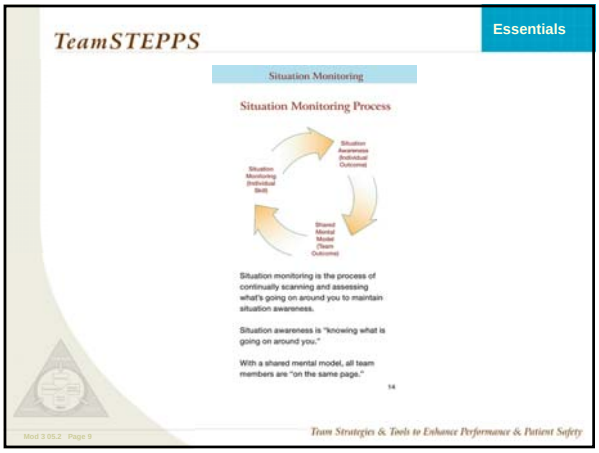

TeamSTEPPS
Essentials
MTS
CONTINGENCY TEAMS
CORE TEAM
ADMINISTRATION
Team Structure
Team Strategies & Tools to Enhance Performance & Patient Safety

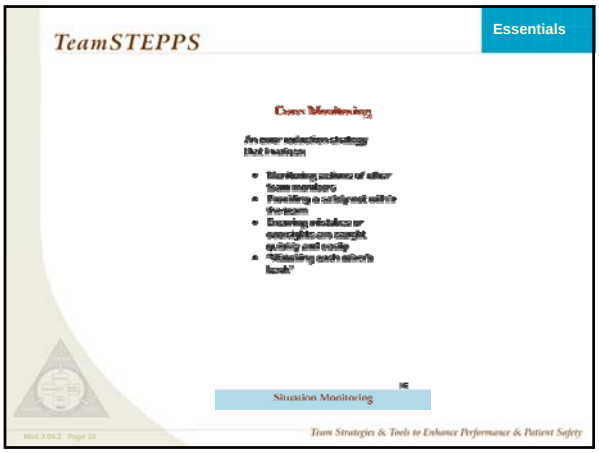

TeamSTEPPS
Essentials
Leadership
Team Strategies & Tools to Enhance Performance & Patient Safety

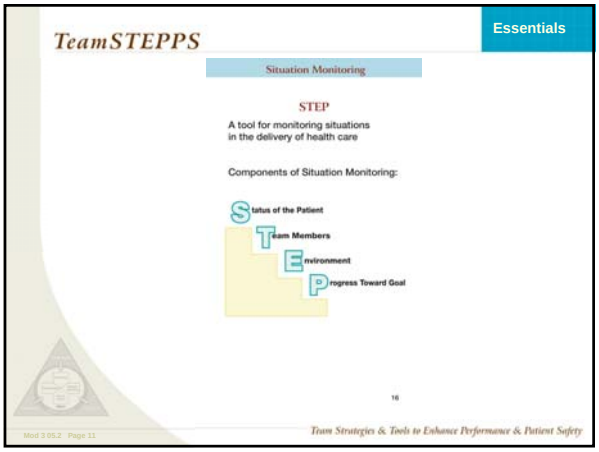

TeamSTEPPS
Essentials
Leadership
Planning
Problem Solving
Process Improvement
Team Strategies & Tools to Enhance Performance & Patient Safety

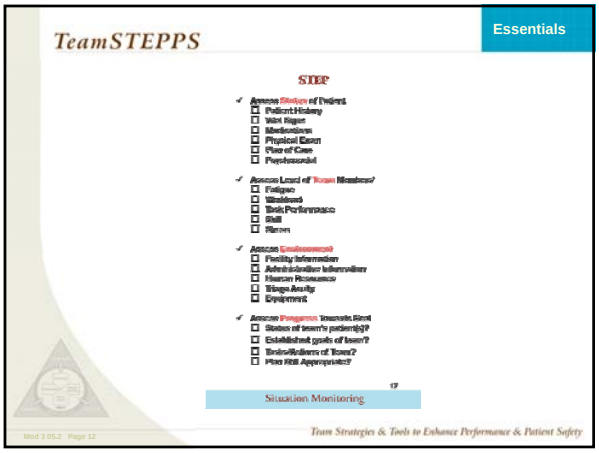

TeamSTEPPS
Essentials
Leadership
Team Strategies & Tools to Enhance Performance & Patient Safety

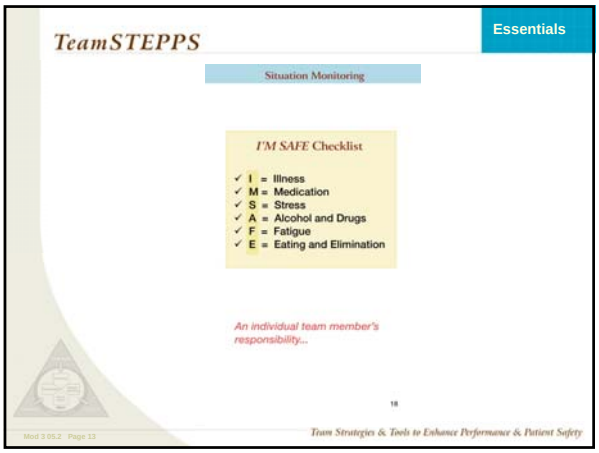

TeamSTEPPS
Essentials
Leadership
Team Strategies & Tools to Enhance Performance & Patient Safety

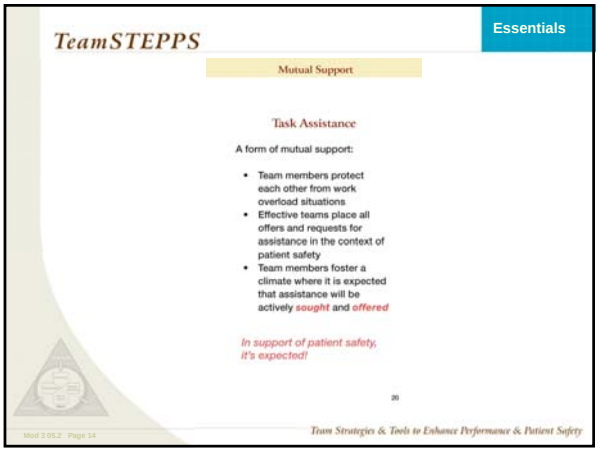

TeamSTEPPS
Essentials
Situation Monitoring
Situation Monitoring Process
Situation monitoring is the process of continually scanning and assessing what's going on around you to maintain situation awareness.
Situation awareness is "knowing what is going on around you."
With a shared mental model, all team members are "on the same page."
Team Strategies & Tools to Enhance Performance & Patient Safety

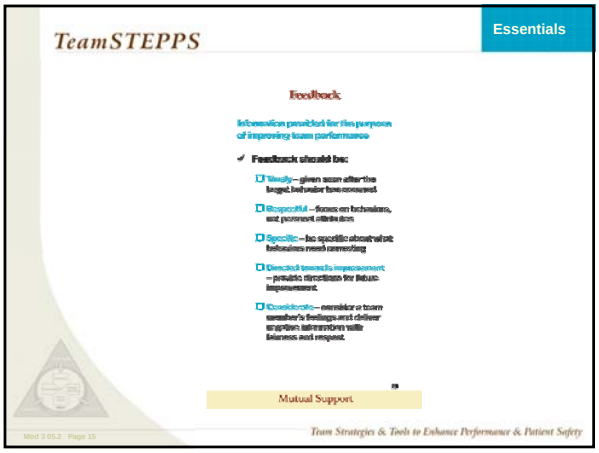

TeamSTEPPS
Essentials
Situation Monitoring
Team Strategies & Tools to Enhance Performance & Patient Safety

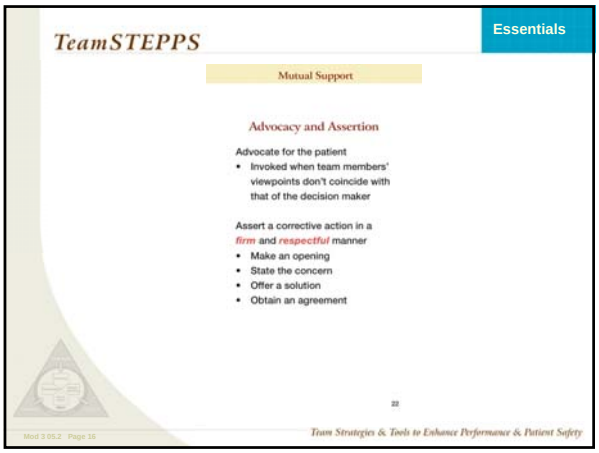

TeamSTEPPS
Essentials
Situation Monitoring
STEP
A tool for monitoring situations in the delivery of health care
Components of Situation Monitoring:
Status of the Patient
Team Members
Environment
Progress Toward Goal
16
Team Strategies & Tools to Enhance Performance & Patient Safety

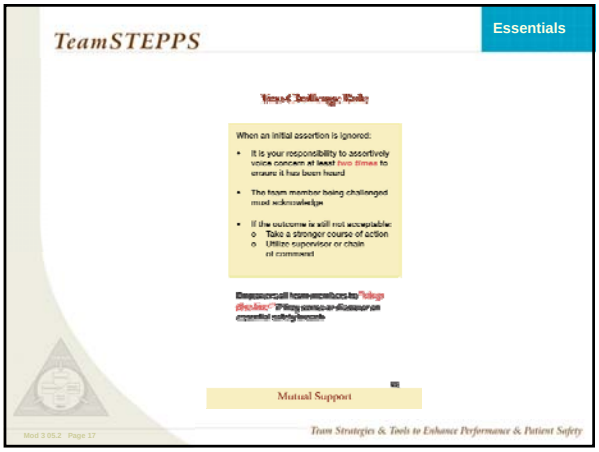

TeamSTEPPS
Essentials
STEP
Situation Monitoring
Team Strategies & Tools to Enhance Performance & Patient Safety

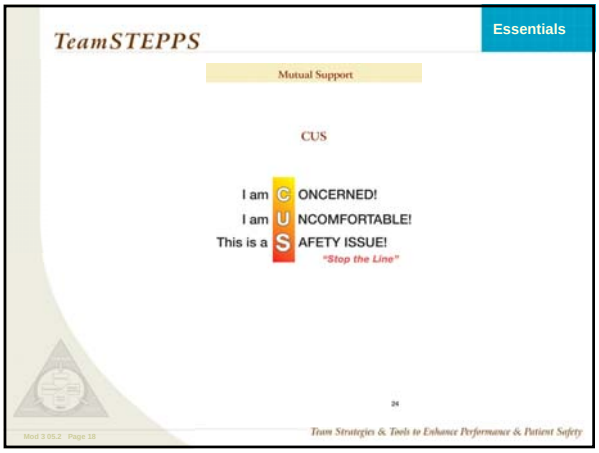

TeamSTEPPS
Essentials
Situation Monitoring
I'M SAFE Checklist
✓ I = Illness
✓ M = Medication
✓ S = Stress
✓ A = Alcohol and Drugs
✓ F = Fatigue
✓ E = Eating and Elimination
An individual team member's responsibility...
18
Team Strategies & Tools to Enhance Performance & Patient Safety

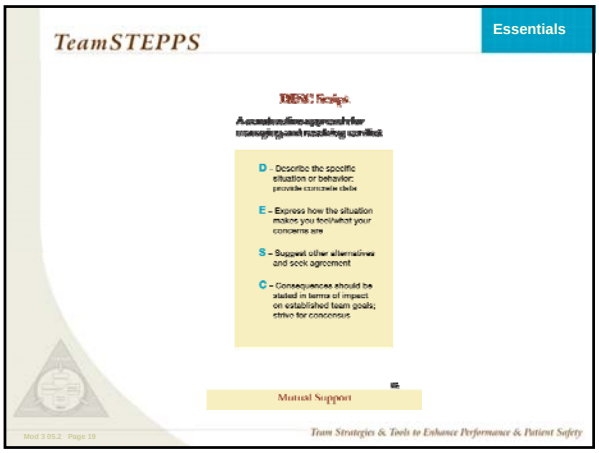

TeamSTEPPS
Essentials
Mutual Support
Task Assistance
A form of mutual support:
• Team members protect each other from work overload situations
• Effective teams place all offers and requests for assistance in the context of patient safety
• Team members foster a climate where it is expected that assistance will be actively sought and offered
In support of patient safety, it's expected!
20
Team Strategies & Tools to Enhance Performance & Patient Safety

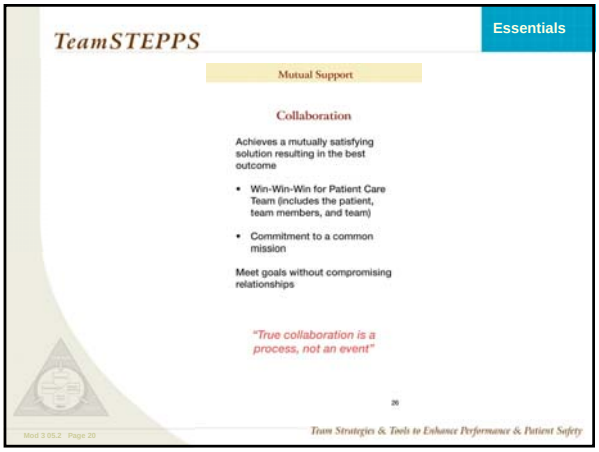

TeamSTEPPS
Essentials
Feedback
Information provided for the purpose of improving team performance
✓ Feedback should be:
Mutual Support
Team Strategies & Tools to Enhance Performance & Patient Safety

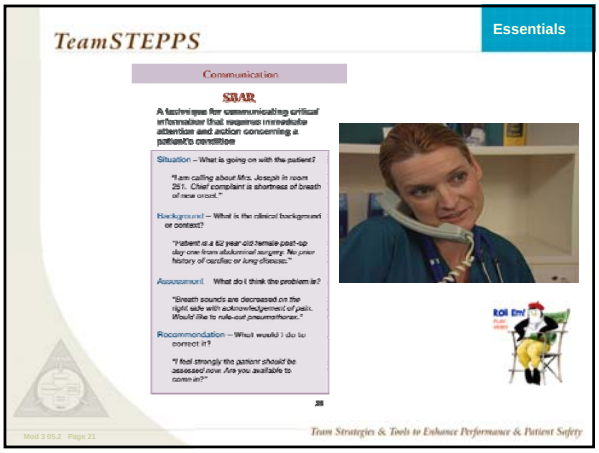

TeamSTEPPS
Essentials
Mutual Support
Advocacy and Assertion
Advocate for the patient
• Invoked when team members' viewpoints don't coincide with that of the decision maker
Assert a corrective action in a firm and respectful manner
• Make an opening
• State the concern
• Offer a solution
• Obtain an agreement
22
Mod 3 05.2 Page 16
Team Strategies & Tools to Enhance Performance & Patient Safety

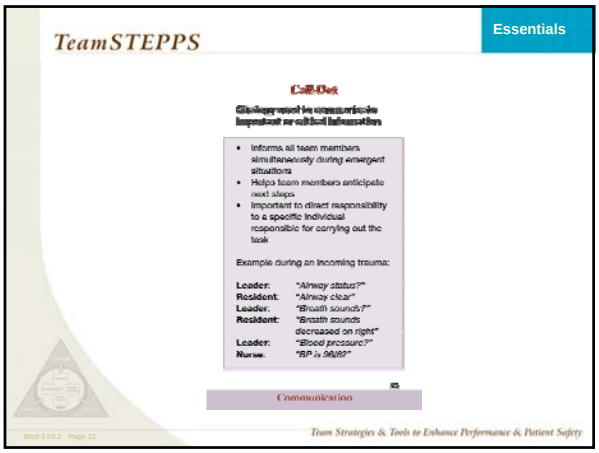

TeamSTEPPS
Essentials
When an initial assertion is ignored:
• It is your responsibility to assertively voice concern at least two times to ensure it has been heard
• The team member being challenged must acknowledge
• If the outcome is still not acceptable:
o Take a stronger course of action
o Utilize supervisor or chain of command
Mutual Support
Mod 3 05.2 Page 17
Team Strategies & Tools to Enhance Performance & Patient Safety

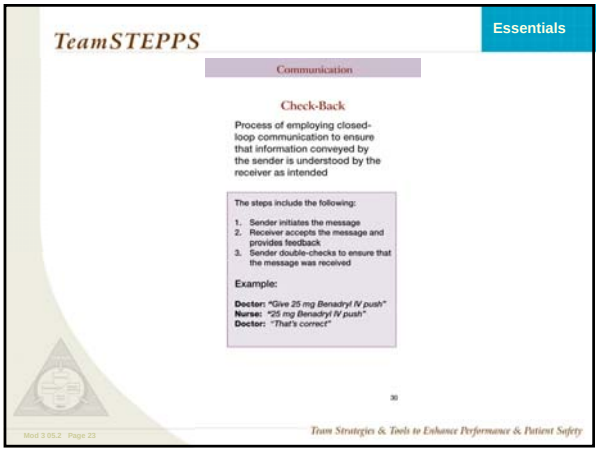

TeamSTEPPS
Essentials
Mutual Support
CUS
I am C ONCERNED!
I am U NCOMFORTABLE!
This is a S AFETY ISSUE!
"Stop the Line"
24
Mod 3 05.2 Page 18
Team Strategies & Tools to Enhance Performance & Patient Safety

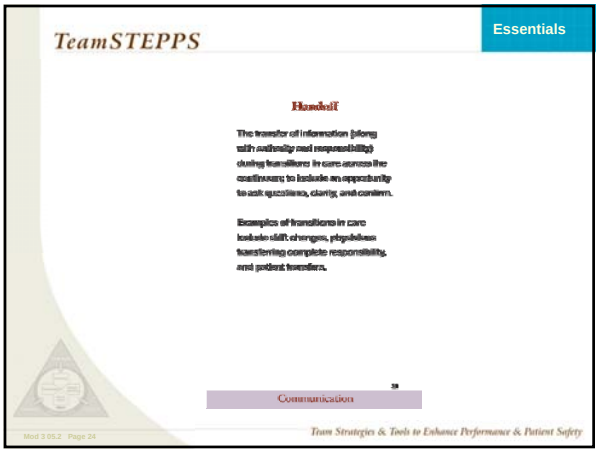

TeamSTEPPS
Essentials
DESC Scripts
A structured approach for managing and resolving conflict
D - Describe the specific situation or behavior; provide concrete data
E – Express how the situation makes you feel/what your concerns are
S – Suggest other alternatives and seek agreement
C – Consequences should be stated in terms of impact on established team goals; strive for concensus
Mutual Support
Team Strategies & Tools to Enhance Performance & Patient Safety

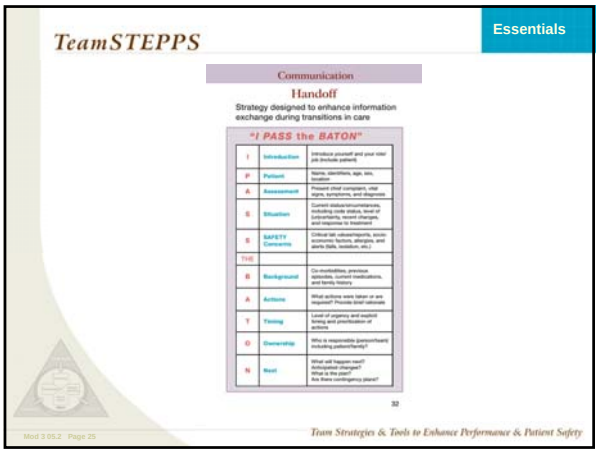

TeamSTEPPS
Essentials
Mutual Support
Collaboration
Achieves a mutually satisfying solution resulting in the best outcome
• Win-Win-Win for Patient Care Team (includes the patient, team members, and team)
• Commitment to a common mission
Meet goals without compromising relationships
"True collaboration is a process, not an event"
Team Strategies & Tools to Enhance Performance & Patient Safety

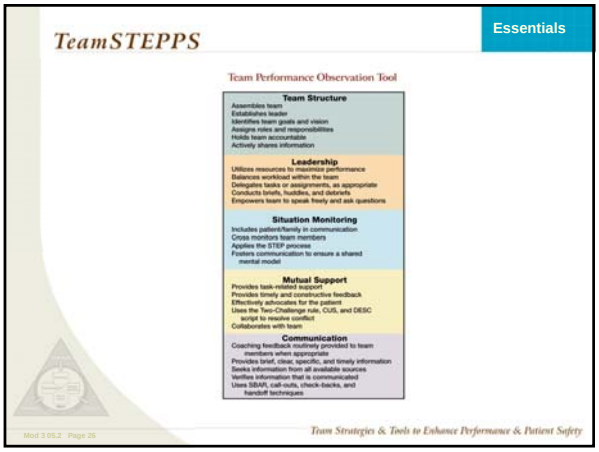

TeamSTEPPS
Essentials
Communication
SBAR
A technique for communicating critical information that requires immediate attention and action concerning a patient's condition
Situation – What is going on with the patient?
"I am calling about Mrs. Joseph in room 251. Chief complaint is shortness of breath of new onset."
Background – What is the clinical background or context?
"Patient is a 52 year old female post-op day one from abdominal surgery. No prior history of cardiac or lung disease."
Assessment – What do I think the problem is?
"Breath sounds are decreased on the right side with acknowledgement of pain. Would like to rule-out pneumothorax."
Recommendation – What would I do to correct it?
"I feel strongly the patient should be assessed now. Are you available to come in?"
Team Strategies & Tools to Enhance Performance & Patient Safety

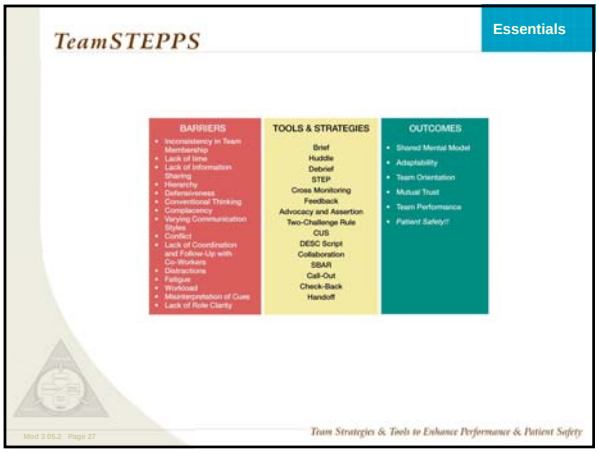

TeamSTEPPS
Essentials
Call-Out
Informs all team members simultaneously during emergent situations
Helps team members anticipate next steps
Important to direct responsibility to a specific individual responsible for carrying out the task
Example during an incoming trauma:
Leader: "Airway status?"
Resident: "Airway clear"
Leader: "Breath sounds?"
Resident: "Breath sounds decreased on right"
Leader: "Blood pressure?"
Nurse: "BP is 96/60"
Communication
Team Strategies & Tools to Enhance Performance & Patient Safety


TeamSTEPPS
Essentials
Communication
Check-Back
Process of employing closed-loop communication to ensure that information conveyed by the sender is understood by the receiver as intended
The steps include the following:
1. Sender initiates the message
2. Receiver accepts the message and provides feedback
3. Sender double-checks to ensure that the message was received
Example:
Doctor: "Give 25 mg Benadryl IV push"
Nurse: "25 mg Benadryl IV push"
Doctor: "That's correct"
Team Strategies & Tools to Enhance Performance & Patient Safety


TeamSTEPPS
Essentials
Handoff
The transfer of information (along with authority and responsibility) during transitions in care across the continuum; to include an opportunity to ask questions, clarify, and confirm.
Examples of transitions in care include shift changes, physician transferring complete responsibility, and patient transfers.
Communication
Team Strategies & Tools to Enhance Performance & Patient Safety


TeamSTEPPS
Essentials
Communication
Handoff
Strategy designed to enhance information exchange during transitions in care
"I PASS the BATON"
I Introduction Introduce yourself and your role/ job (include patient)
P Patient Name, identifiers, age, sex, location
A Assessment Present chief complaint, vital signs, symptoms, and diagnosis
S Situation Current status/circumstances, including the nature of illness (urgent/emergent), recent changes, and response to treatment
S SAFETY Concerns Critical lab values/reports, socio-economic factors, allergies, and alerts (falls, isolation, etc.)
THE
B Background Co-morbidities, previous episodes, current medications, and family history
A Actions What actions were taken or are required? Provide brief rationale
T Timing Level of urgency and explicit timing and prioritization of actions
O Ownership Who is responsible (person/team) including patient/family?
N Next What will happen next? Anticipated changes? What is the plan? Are there contingency plans?
32
Mod 3 05.2 Page 25
Team Strategies & Tools to Enhance Performance & Patient Safety


TeamSTEPPS
Essentials
Team Performance Observation Tool
Team Structure
Assembles team
Establishes leader
Identifies team goals and vision
Assigns roles and responsibilities
Holds team accountable
Actively shares information
Leadership
Utilizes resources to maximize performance
Balances workload within the team
Delegates tasks or assignments, as appropriate
Conducts briefs, huddles, and debriefs
Empowers team to speak freely and ask questions
Situation Monitoring
Includes patient/family in communication
Cross monitors team members
Applies the STEP process
Fosters communication to ensure a shared mental model
Mutual Support
Provides task-related support
Provides timely and constructive feedback
Effectively advocates for the patient
Uses the Two-Challenge rule, CUS, and DESC script to resolve conflict
Collaborates with team
Communication
Coaching feedback routinely provided to team members when appropriate
Provides brief, clear, specific, and timely information
Seeks information from all available sources
Verifies information that is communicated
Uses SBAR, call-outs, check-backs, and handoff techniques
Mod 3 05.2 Page 26
Team Strategies & Tools to Enhance Performance & Patient Safety


TeamSTEPPS
Essentials
BARRIERS
Inconsistency in Team Membership
Lack of time
Lack of Information Sharing
Hierarchy
Defensiveness
Conventional Thinking
Complacency
Varying Communication Styles
Conflict
Lack of Coordination and Follow-Up with Co-Workers
Distractions
Fatigue
Workload
Misinterpretation of Cues
Lack of Role Clarity
TOOLS & STRATEGIES
Brief
Huddle
Debrief
STEP
Cross Monitoring
Feedback
Advocacy and Assertion
Two-Challenge Rule
CUS
DESC Script
Collaboration
SBAR
Call-Out
Check-Back
Handoff
OUTCOMES
Shared Mental Model
Adaptability
Team Orientation
Mutual Trust
Team Performance
Patient Safety!!
Mod 3 05.2 Page 27
Team Strategies & Tools to Enhance Performance & Patient Safety

TeamSTEPPS
Essentials
Identifying Opportunities to Use TeamSTEPPS Tools and Strategies
Team Strategies & Tools to Enhance Performance & Patient Safety