

**Situation Monitoring**

AHRQ  
Agency for Healthcare Research and Quality  
Improving Healthcare in the 21st Century

DHA  
Department of Health & Human Services

TeamSTEPPS<sup>®</sup> 2.0 for Long-Term Care

---

---

---

---

---

---

---

---

TeamSTEPPS<sup>®</sup> 2.0 for Long-Term Care

Situation Monitoring

**Teamwork Exercise #2**

EXERCISE

Mod 5.LTC.2.0 Page 2

Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

TeamSTEPPS<sup>®</sup> 2.0 for Long-Term Care

Situation Monitoring

**Objectives**

- Discuss how situation monitoring affects team processes and outcomes
- List components of the STEP mnemonic
- Explain situation awareness and identify undermining conditions
- Define a shared mental model and how it is cultivated within a team

Mod 5.LTC.2.0 Page 3

Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0 for Long-Term Care** Situation Monitoring

**Situation Monitoring**

- Ensures new or changing information is identified for communication and decision-making
- Leads to effective support of fellow team members

Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0 for Long-Term Care** Situation Monitoring

**A Continuous Process**

Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0 for Long-Term Care** Situation Monitoring

**STEP**

**Components of Situation Monitoring:**

Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

Situation Monitoring

**TeamSTEPPS® 2.0 for Long-Term Care**

### Status of the Resident

The diagram shows four interconnected components: 'Status of the Resident' (top left), 'Team Members' (middle left), 'Environment' (middle right), and 'Progress Toward Goal' (bottom right). Each component is represented by a blue box with a white letter icon.

- Resident History
- Vital Signs
- Medications
- Physical Exam
- Plan of Care
- Psychosocial Condition

Mod 5.LTC 2.0 Page 7 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

---

---

Situation Monitoring

**TeamSTEPPS® 2.0 for Long-Term Care**

### Team Members

The diagram shows four interconnected components: 'Status of the Resident' (top left), 'Team Members' (middle left), 'Environment' (middle right), and 'Progress Toward Goal' (bottom right). Each component is represented by a blue box with a white letter icon.

- Fatigue
- Workload
- Task Performance
- Skill Level
- Stress Level

Mod 5.LTC 2.0 Page 8 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

---

---

Situation Monitoring

**TeamSTEPPS® 2.0 for Long-Term Care**

### I'M SAFE Checklist

- I** = Illness
- M** = Medication
- S** = Stress
- A** = Alcohol and Drugs
- F** = Fatigue
- E** = Eating and Elimination

Mod 5.LTC 2.0 Page 9 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

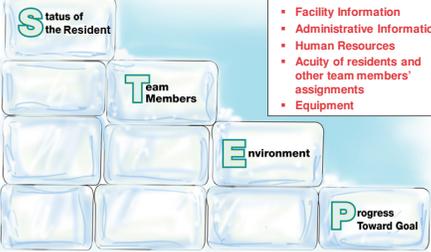
---

---

---

**TeamSTEPPS® 2.0** for Long-Term Care
Situation Monitoring

### Environment



The diagram shows a 3x3 grid of blue huddle cards. The top-left card is labeled 'S'tatus of the Resident'. The middle-left card is labeled 'T'eam Members'. The middle-right card is labeled 'E'nvironment'. The bottom-right card is labeled 'P'rogress Toward Goal'. A list of bullet points is positioned to the right of the grid.

- Facility Information
- Administrative Information
- Human Resources
- Acuity of residents and other team members' assignments
- Equipment

Mod 9.LTC 2.0 Page 10
Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0** for Long-Term Care
Situation Monitoring

### Progress Toward Goal



The diagram shows a 3x3 grid of blue huddle cards. The top-left card is labeled 'S'tatus of the Resident'. The middle-left card is labeled 'T'eam Members'. The middle-right card is labeled 'E'nvironment'. The bottom-right card is labeled 'P'rogress Toward Goal'. A list of bullet points is positioned to the right of the grid.

- Call a Huddle!
- Status of Team's Resident(s)
- Goal of Team
- Tasks/Actions That Are or Need To Be Completed
- Plan Still Appropriate

Mod 9.LTC 2.0 Page 11
Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0** for Long-Term Care
Situation Monitoring

### Situation Monitoring Exercise

Mrs. Johnson, who uses a walker, falls while trying to walk independently to her bathroom. Her head is bleeding and she has fallen directly on her hip. A nurse and a nursing assistant hear Mrs. Johnson cry for help and immediately go to her room. Nancy, the nurse, promptly assesses Mrs. Johnson. Nancy calls the nursing station and asks them to call EMS and Mrs. Johnson's physician immediately. Nancy then directs Judy, the nursing assistant, to retrieve 4x4 gauze from the treatment cart. David, another nursing assistant, sees Judy urgently leaving Mrs. Johnson's room and goes in to see if he can help. Upon his arrival, Nancy tells him to maintain C-spine precautions until EMS arrives. Noticing David's confused expression, Nancy explains, "Place one hand on each side of Mrs. Johnson's head and keep it in straight alignment with her spine."

Mod 9.LTC 2.0 Page 12


EXERCISE

Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

---

---

---

---

TeamSTEPPS® 2.0 for Long-Term Care Situation Monitoring

### Situation Awareness is...

**The state of knowing the current conditions affecting one's work.**

Includes knowing...

- Status of the resident
- Status of other team members
- Environmental conditions
- Current progress toward the goal



Mod 9.LTC 2.0 Page 13 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

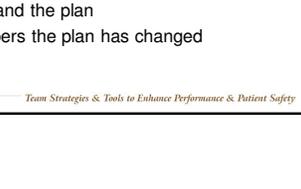
---

TeamSTEPPS® 2.0 for Long-Term Care Situation Monitoring

### Conditions That Undermine Situation Awareness

**Failure to—**

- Share information with the team
- Request information from others
- Direct information to specific team members
- Include resident or family in communication
- Utilize resources fully (e.g., status board, automation)
- Maintain documentation
- Know and understand where to focus attention
- Know and understand the plan
- Inform team members the plan has changed



Mod 9.LTC 2.0 Page 14 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

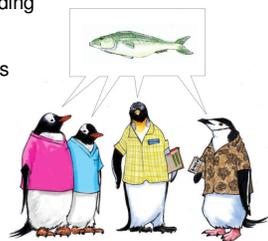
---

---

TeamSTEPPS® 2.0 for Long-Term Care Situation Monitoring

### A Shared Mental Model is...

The perception of, understanding of, or knowledge about a situation or process that is shared among team members through communication



Mod 9.LTC 2.0 Page 15 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

*TeamSTEPPS*<sup>®</sup> 2.0 for Long-Term Care Situation Monitoring

### Shared Mental Model?



Mod 5.LTC 2.0 Page 16 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

*TeamSTEPPS*<sup>®</sup> 2.0 for Long-Term Care Situation Monitoring

### When and How to Share?

<p><b>When:</b></p> <ul style="list-style-type: none"> <li>■ Briefs</li> <li>■ Huddles</li> <li>■ Debriefs</li> <li>■ Transitions in Care</li> </ul>	<p><b>How:</b></p> <ul style="list-style-type: none"> <li>■ SBAR</li> <li>■ Call-outs</li> <li>■ Check-backs</li> </ul>
--	---

Mod 5.LTC 2.0 Page 17 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

*TeamSTEPPS*<sup>®</sup> 2.0 for Long-Term Care Situation Monitoring

### Practical Exercise

- Gloria Valdez
  - New admission
  - 87 years old
  - Dementia diagnosis
  - Confused, anxious since admission
  - Involved daughter



Mod 5.LTC 2.0 Page 18 Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0** for Long-Term CareSituation Monitoring

### What Do You See?






Mod 5.LTC 2.0 Page 19Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0** for Long-Term CareSituation Monitoring

### How Shared Mental Models Help Teams

- Lead to mutual understanding of situation
- Lead to more effective communication
- Enable back-up behaviors
- Help ensure understanding of each other's roles and how they interplay
- Enable better prediction and anticipation of team needs
- Create commonality of effort and purpose

Mod 5.LTC 2.0 Page 20Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

**TeamSTEPPS® 2.0** for Long-Term CareSituation Monitoring

### Tools & Strategies Summary

BARRIERS	TOOLS and STRATEGIES	OUTCOMES
<ul style="list-style-type: none"> <li>■ Inconsistency in Team Membership</li> <li>■ Lack of Time</li> <li>■ Lack of Information Sharing</li> <li>■ Hierarchy</li> <li>■ Defensiveness</li> <li>■ Conventional Thinking</li> <li>■ Complacency</li> <li>■ Varying Communication Styles</li> <li>■ Conflict</li> <li>■ Lack of Coordination and Followup With Coworkers</li> <li>■ Distractions</li> <li>■ Fatigue</li> <li>■ Workload</li> <li>■ Misinterpretation of Cues</li> <li>■ Lack of Role Clarity</li> </ul>	<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• SBAR</li> <li>• Call-Out</li> <li>• Check-Back</li> <li>• Handoff</li> </ul> <p><b>Leading Teams</b></p> <ul style="list-style-type: none"> <li>• Brief</li> <li>• Huddle</li> <li>• Debrief</li> </ul> <p><b>Situation Monitoring</b></p> <ul style="list-style-type: none"> <li>• STEP</li> <li>• IM SAFE</li> </ul>	<ul style="list-style-type: none"> <li>■ Shared Mental Model</li> <li>■ Adaptability</li> <li>■ Team Orientation</li> <li>■ Mutual Trust</li> <li>■ Team Performance</li> <li>■ Resident Safety!!</li> </ul>

Mod 5.LTC 2.0 Page 21Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---

### Applying TeamSTEPPS Exercise

1. Is your teamwork issue related to the team's or individuals' skill at monitoring the situation?
2. If yes, what is the situation monitoring issue?
3. Which situation monitoring tools and/or strategies might you consider implementing to address the issue?



Mod 9.LTC 2.0 Page 22



Team Strategies & Tools to Enhance Performance & Patient Safety

---

---

---

---

---

---

---

---