Definition of Behavioral Markers for Performance Assessment for Communication and Teamwork (PACT)

Please review the descriptions of each behavioral marker before viewing new videos.

Please refer to the glossary when you are not familiar with terms.

Team Structure:

1. Recognize LEADER: Team members recognize a leader.
   - Team members follow orders from one person.
   - Team members defer to leader's direction.
   - Team members confer with leader before making decisions.

   Key coder task(s):
   - ✓ The coder can recognize leader behaviors.
   - ✓ The coder can recognize who the leader is.

2. Understand ROLE: Team members demonstrate understanding of role/responsibility.
   - Team members follow orders from a leader.
   - Team members provide suggestions/feedback based on their professional training.
   - Team members take up tasks appropriate to their role.

   Key coder task(s):
   - ✓ The coder can recognize the role/responsibility of each team member.

3. Understand TEAM GOALS: Team members demonstrate understanding of the team goals.
   - Team leader elicits team goals.
   - Team members offer professional suggestions which help achieving the goals.
   - Team members follow orders which lead to achieving the goals.

   Key coder task(s):
   - ✓ The coder can recognize at least one of the team goals.

4. Refer to PROTOCOLS/CHECKLISTS: Team members refer to established protocols and checklists for the procedure/intervention.
   - Team members name a protocol/checklist (ACLS protocol) to follow.
   - Team members ask about established protocols/checklists which are suitable for the situation.
   - Team members offer suggestions with the source.
   - Team members take out handbook or pocket cards for reference.

   Key coder task(s):
   - ✓ The coder can recognize protocols/checklists which the team refers to.

5. Respond to potential ERRORS: Team members respond to potential errors or complications with procedures that avoid the error or complication.
   - Team members raise their concerns.
   - Team members stop the intervention and call for a huddle.
   - Team members use CUS or Two-Challenge rules.

   Key coder task(s):
   - ✓ The coder can recognize a team member who stops the flow.

6. SHARE IMFORMATION: Team members actively share information with each other.
   - Team members call out lab results.
   - Team members read patient history out loud.
   - Team members use SBAR.

   Key coder task(s):
   - ✓ The coder can recognize the essential information that is shared.

Leadership:

7. Delegate TASKS: The team leader delegates tasks or assignments.
   - Team leader assigns team members appropriate tasks for their professional roles.
   - Team leader asks different team members to perform different tasks.
   - Team leader does not overload any one of the team members.

   Key coder task(s):
   - ✓ The coder can recognize that team members are comfortable with their responsibilities.
   - ✓ The coder can recognize if any of the team members is overwhelmed.

8. <u>BRIEFS/HUDDLES/DEBRIEFS</u>: The team leader conducts briefs, huddles, and/or debriefs.
   - Team leader asks team members to gather and share information.
   - Team members gather and discuss about the differential diagnosis and intervention plan.
   - Team members gather and talk about what just happened.
   Key coder task(s):
   ✓ The coder can recognize team members gather together.

9. <u>AUTHORITY VS PARTICIPATION</u>: The team leader assures maintenance of an appropriate balance between command authority and team member participation.
   - Team members gather together to offer professional suggestions.
   - Team leader makes the final decision on patient's care based on the input from team members.
   - Team leader is receptive about team members' suggestions.
   Key coder task(s):
   ✓ The coder can recognize the inputs from team members.
   ✓ The coder can recognize the leader makes the final decision.

10. <u>COLLECTIVE INPUT</u>: The team leader makes final decisions after collective input.
    - Team members provide professional suggestions.
    - Team leader makes the final decision after a huddle.
    - Team leader asks for professional suggestions.
    Key coder task(s):
    ✓ The coder can recognize the input from team members.
    ✓ The coder can recognize who the leader is.

11. <u>SPEAK UP</u>: The team leader empowers team members to speak freely and ask questions.
    - Team leader asks questions.
    - Team members ask questions.
    - Team members raise their concerns and offer professional opinions.
    Key coder task(s):
    ✓ The coder can recognize the culture of speaking freely and asking questions.

Situation Monitoring:

12. <u>STEP PROCESS</u>: The team applies the STEP process when monitoring the situation.
    STEP process - *Statu*s of the patient, *Team* Members, *Environment, Progress* Towards Goal

    - Team members update status of patient (patient history, psychological status, vital signs etc.) to the team when something changes.
    - Team leader and members ensure each other is suit for work.
    - Team members know how to operate the equipment needed and the resources available.
    - Team leader inform the team when there is change in the care plan.
    Key coder task(s):
    ✓ The coder can recognize the team is aware of the situation through STEP process.

13. <u>Attend to INDICATORS</u>: The team promotes each other to attend to all significant clinical indicators throughout the procedure/intervention.
    - Team members call out change of patient's vital sign throughout the procedure.
    - Team members alert the team when significant clinical indicators appear (e.g. patient stops breathing or loses consciousness).
    - Team members share new lab results with the team.
    Key coder task(s):
    ✓ The coder can recognize the sharing of significant clinical indicators throughout the intervention.

14. <u>Maintain SITUATION AWARENESS</u>: Disagreements or conflicts among team members are addressed without a loss of situation awareness.
    - Team members resolve conflicts when designated team members monitoring patient's status.
    - Team members have the big picture in mind when they are in disagreement.
    Key coder task(s):
    ✓ The coder can recognize disagreements or conflicts between team members.
    ✓ The coder can recognize the team is aware of the situation during conflict resolution.

15. <u>PATIENT included</u>: The patient/family is included in communication.
- Team members explain to the patient/family about the procedure/intervention/care plan for the patient.
- Team members ask questions and receive information about the patient from the patient/family.
- Team members answer questions/concerns from the patient/family.

Key coder task(s):
✓ The coder can recognize communication between team members and the patient/family.

Mutual Support:

16. <u>Acknowledge STATEMENT</u>: Team members acknowledge statement directed at avoiding or containing errors or seeking clarification.
- Team leader and/or members acknowledge team members' concerns verbally.
- Team members ask questions or ask for repetition of tasks.

Key coder task(s):
✓ The coder can recognize team leader and members receive questions/concerns raised by others well.
✓ The coder can recognize the team is responsive to concerns and requests.

17. <u>ALL PARTICIPATE</u>: All members of the team participate in the activity.
- Team leader delegate tasks to each team member and ensure the participation of team members.
- All team members work on assigned tasks in a timely manner.

Key coder task(s):
✓ The coder can recognize the team leader assigns tasks to each team member.
✓ The coder can recognize team members working on individual tasks.

18. <u>Call ATTENTION</u> to error causing actions: Team members call attention to actions that they feel could cause errors or complications.
- Team leader and/or members express concerns verbally.
- Team leader and/or members ensure the team is aware of the possibility of errors/complications.

Key coder task(s):
✓ The coder can recognize concerns raised by the team.

19. <u>ASK FOR HELP</u>: Team members ask each other for assistance prior to or during periods of task overload.
- Team members ask help from team leader or other team members.
- Team members request other team members to perform tasks when help is needed.

Key coder task(s):
✓ The coder can hear request for help from team members.
✓ The coder can recognize request for help happens when it is appropriate.

20. <u>CUS</u>: Team members use the Two-Challenge rule, CUS, and DESC script to resolve conflict.
- Team members use words such as "I am concerned", "I feel uncomfortable", and "This is a safety issue" to express concerns.
- Team members bring up the same concerns more than once.
- Team members provide suggestions to change the care plan.

Key coder task(s):
✓ The coder can recognize the communication strategies such as the Two-Challenge rule, CUS, and DESC script.

CUS - *C*oncerned, *U*ncomfortable, *S*afety Issue; DESC Script - *D*escribe the specific situation; *E*xpress how the situation makes you feel; *S*uggest other alternatives; *C*onsequences should stated in terms of impact on established team goals

Communication:

21. <u>VERBALIZE</u> activities: Team members verbalize their activities aloud when they are actively involved with the patient.
- Team members say what they are doing to the patient with a volume that other team members can hear.

Key coder task(s):
✓ The coder can hear what the team members are doing to the patient.

22. <u>REPEAT BACK</u>: Team members repeat back or paraphrase instructions and clarifications to indicate that they heard them correctly.
    - Team members repeat the assigned task from team leader and /or other team members.
    Key coder task(s):
    - ✓ The coder can hear repeated tasks from team members.

23. <u>HAND OFF</u>: Team member A hands off the patient's case to team member B, and team member B assumes responsibility for the patient.
    - Team member A describes patient's situation and care plan to team member B.
    - A member of team A describes patient's situation and care plan to a member of team B.
    Key coder task(s):
    - ✓ The coder can hear and understand patient's current situation and care plan from the conversation.

24. <u>SBAR</u>: The team demonstrates efficient communication skills, including patient *S*ituation, *B*ackground, *A*ssessment, and *R*ecommendation (SBAR).
    - When team members speak to a new member of the team or call for help, they describe patient Situation, Background, their Assessment, and Recommendation in the conversation.
    - When team leader calls for a huddle/brief/debrief, he/she describes patient Situation, Background, his/her Assessment, and Recommendation.
    Key coder task(s):
    - ✓ The coder can recognize team leader and/or team members using SBAR in their conversation.

25. Ask for <u>CLARIFICATION</u>: Team members ask questions of the team for clarification.
    - Team members ask team leader and/or other team members to explain their requests or assigned tasks.
    Key coder task(s):
    - ✓ The coder can hear request to explain or repeat assigned tasks.

26. <u>CLOSED-LOOP COMMUNICATION</u>: Team members demonstrate closed-loop communication such as check-backs.
    - Team members repeat back requested task to the leader or the team. After the requested task is done, team members come back and report to the leader or the team.
    Key coder task(s):
    - ✓ The coder can recognize a closed-loop communication. (Task requested->Task repeated->Task completed->Task reported)