**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 INFORMATION:** 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. **BRIEFS/HUDDLES/DEBRIEFS:** 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. **AUTHORITY VS PARTICIPATION:** 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. **COLLECTIVE INPUT:** 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. **SPEAK UP:** 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. **STEP PROCESS:** The team applies the STEP process when monitoring the situation.
    - **STEP process - Status 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. **Attend to INDICATORS:** 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. **Maintain SITUATION AWARENESS:** 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. **PATIENT included**: 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. **Acknowledge STATEMENT**: 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. **ALL PARTICIPATE**: 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. **Call ATTENTION** 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. **ASK FOR HELP**: 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. **CUS**: 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 - Concerned, Uncomfortable, Safety Issue; DESC Script - Describe the specific situation; Express how the situation makes you feel; Suggest other alternatives; Consequences should stated in terms of impact on established team goals

**Communication:**

21. **VERBALIZE** 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. **REPEAT BACK**: 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. **HAND OFF**: 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. **SBAR**: The team demonstrates efficient communication skills, including patient Situation, Background, Assessment, and Recommendation (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 CLARIFICATION**: 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. **CLOSED-LOOP COMMUNICATION**: 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)