

SBAR Competency Check List

Consider creating metrics for quality assurance and skill attainment. Sample metric: Care team members will demonstrate use of SBAR through role-play activity meeting minimum score of 80%.

BEFORE Communicating with a healthcare team member remember to:

- Review recent assessments.
- Review recent chart notes.
- Review medication lists and allergies.
- Review knowledge you have about the member.
- Identify which healthcare team members need to be notified or communicated with.
- Identify current Diagnoses (medical and behavioral).
- Identify any significant labs or test results.

Every SBAR report is different. Focus on the concern. Be concise. Not everything in the outline below needs to be reported – just what is needed for the situation, team communication and decision-making, and required documentation (when applicable).

Check off which SBAR communication or documentation was completed (note there will be differences based on each professional healthcare team member and below are typical examples):

(S) Situation:

- | | |
|---|--|
| <input type="checkbox"/> Healthcare team member name/role | <input type="checkbox"/> Other team members involved |
| <input type="checkbox"/> Other identifying information | <input type="checkbox"/> Current concern(s)/presentation |
| <input type="checkbox"/> Patient name | <input type="checkbox"/> Date/time |
| <input type="checkbox"/> Patient applicable information | <input type="checkbox"/> Psychosocial factor(s) |

(B) Background:

- | | |
|--|--|
| <input type="checkbox"/> The Patient is exhibiting/concerned about _____ because _____ | <input type="checkbox"/> The Patient is concerned about _____ |
| <input type="checkbox"/> Historical presentation/ barriers/progress/ labs/diagnostics/symptoms | <input type="checkbox"/> The Patient demonstrates _____ |
| <input type="checkbox"/> The Patient is using X coping skills | <input type="checkbox"/> This is a change from _____ |
| <input type="checkbox"/> Barriers | <input type="checkbox"/> The Patient's mental status/emotional state is: |

(A) Assessment:

- | | |
|--|--|
| <input type="checkbox"/> My assessment of the situation is: | <input type="checkbox"/> Risk levels |
| <input type="checkbox"/> Vitals/lab results/diagnostics | <input type="checkbox"/> Progress of recovery |
| <input type="checkbox"/> Screening/assessment results | <input type="checkbox"/> Functional assessment |
| <input type="checkbox"/> Description of severity of presentation | |

(R) Recommendation/Intervention

- | | |
|--|--|
| <input type="checkbox"/> Improvements for recovery planning based on (S-B-A) | <input type="checkbox"/> List of all measurements |
| <input type="checkbox"/> List all supports needed | <input type="checkbox"/> List all plans |
| <input type="checkbox"/> List all timelines related | <input type="checkbox"/> Other team members needed |
| | <input type="checkbox"/> Other team member plans |

Source: Adapted from SBAR report competency check off, by Bronson Healthcare, n.d.
<http://www.ihl.org/resources/Pages/Tools/SBARToolkit.aspx>. Copyright 2016 by Bronson Healthcare

Huddle evaluation form



This form will help you evaluate how huddles are going in your practice. Use your findings as constructive feedback and discuss with huddle leaders and participants. You may also identify possible ways to improve the huddle (e.g., checklist updates, start time changes or using a timekeeper to keep the huddle on track).

Instructions: Use this modifiable checklist to make sure that the essential elements of the huddle checklist have been completed. For the best results, observe 3 to 5 huddles and provide feedback based on the patterns from multiple observations.

Date:	Start time:	<input type="checkbox"/> Start on time
Observer:	Role:	
Huddle leader:		
Team members in attendance:		
<input type="checkbox"/> Check in with the team <ul style="list-style-type: none"> <input type="checkbox"/> Staffing issues or outages are addressed <input type="checkbox"/> Physician/provider outages that require rescheduling patients are addressed 		
<input type="checkbox"/> Review today's schedule <ul style="list-style-type: none"> <input type="checkbox"/> Identify scheduling opportunities <ul style="list-style-type: none"> <input type="checkbox"/> The team is made aware of the same-day scheduling capacity <input type="checkbox"/> The team is going to address urgent care requests and follow-ups for recently discharged patients <input type="checkbox"/> Determine special patient needs for clinic day <ul style="list-style-type: none"> <input type="checkbox"/> Someone on the team takes ownership for special patient needs <input type="checkbox"/> Recommended referrals to the health educator, social worker, behavioral health, etc. are made 		
<input type="checkbox"/> Identify patients who need care outside of a scheduled visit <ul style="list-style-type: none"> <input type="checkbox"/> Patients are identified and someone takes ownership for following up with them 		
<input type="checkbox"/> The huddle leader reviewed the entire huddle agenda <input type="checkbox"/> As appropriate, the huddle leader reviewed the following items: <ul style="list-style-type: none"> <input type="checkbox"/> A shout-out and/or patient compliment <input type="checkbox"/> Important reminders or announcements about the practice 		
Huddle end time:	<input type="checkbox"/> End on time	
<input type="checkbox"/> The huddle ended on a positive note <input type="checkbox"/> The team members were engaged in the huddle and participated appropriately. Please describe below.		
Notes for huddle leader:		
Suggestions for huddle improvement:		

Source: AMA. Practice transformation series: implementing a daily team huddles. 2015.

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