

# Situation Monitoring



*“Attention to detail is one of the most important details ...”*

– Author Unknown

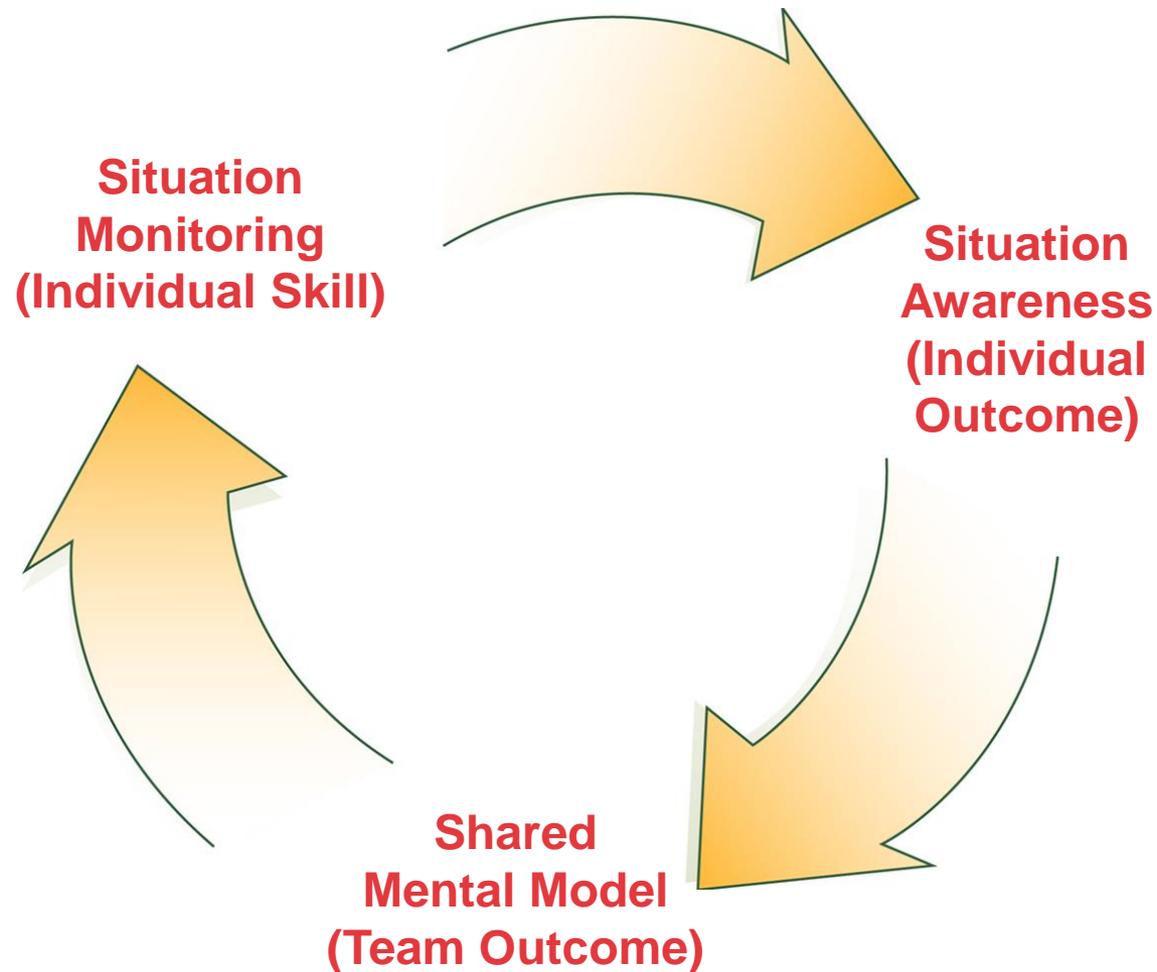
# Objectives

- Define situation monitoring.
- Define cross monitoring.
- Discuss the components of the STEP process.
- Define situation awareness (SA), and identify conditions that undermine SA.
- Discuss the importance of a shared mental model.
- Discuss when to share information.
- Recognize the barriers, tools, strategies, and outcomes of situation monitoring.

# Framework



# A Continuous Process



# Situation Monitoring (Individual Skill)

**Process of *actively scanning* behaviors and actions to assess elements of the situation or environment**

- Fosters mutual respect and team accountability.
- Provides safety net for team.
- Includes cross monitoring.

***... Remember, engage the patient  
whenever possible.***

# Cross Monitoring is...

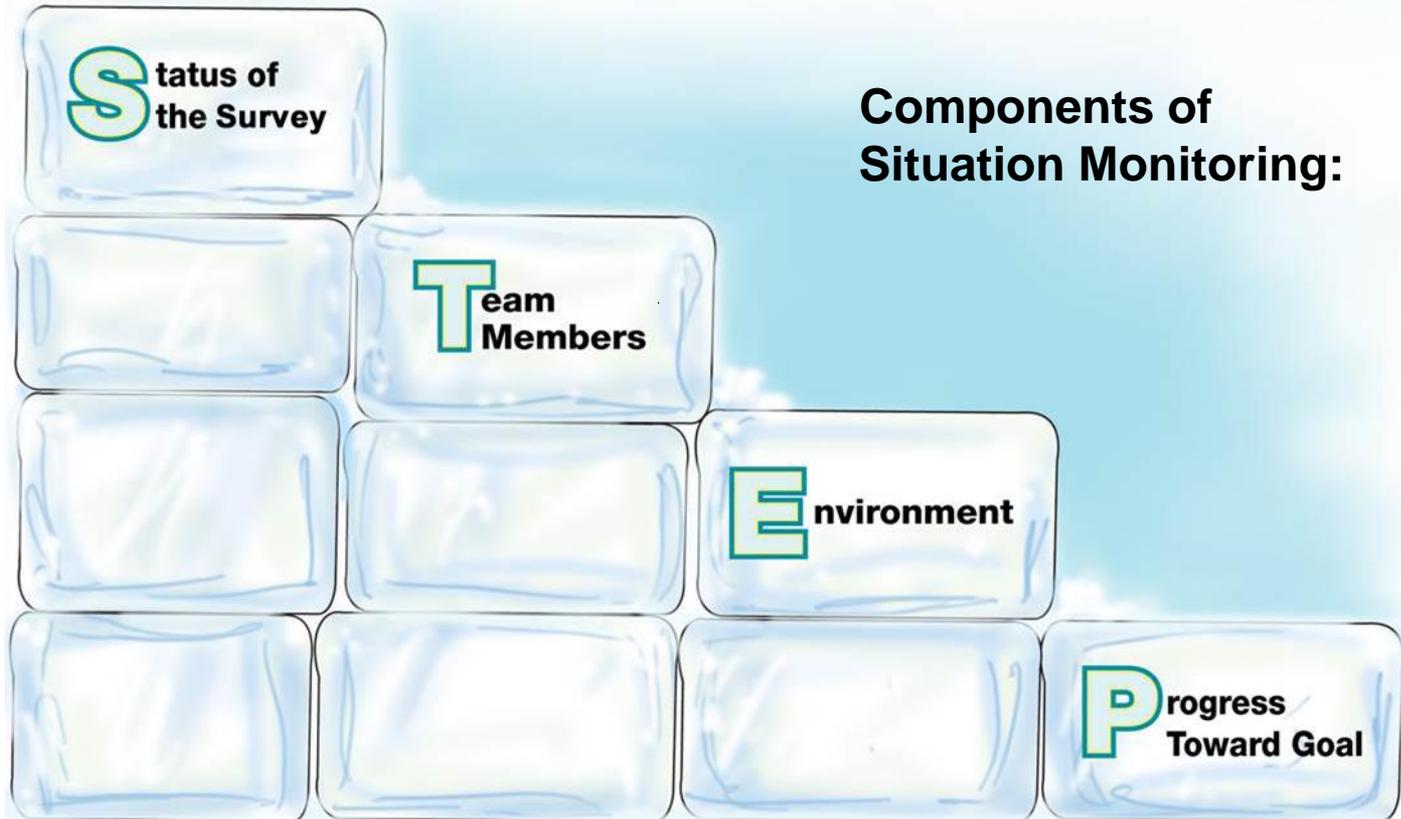
***Process of monitoring the actions of other team members for the purpose of sharing the workload and reducing or avoiding errors***

- Mechanism to help maintain accurate situation awareness.
- Way of “watching each other’s back.”
- Ability of team members to monitor each other’s task execution and give feedback during task execution.

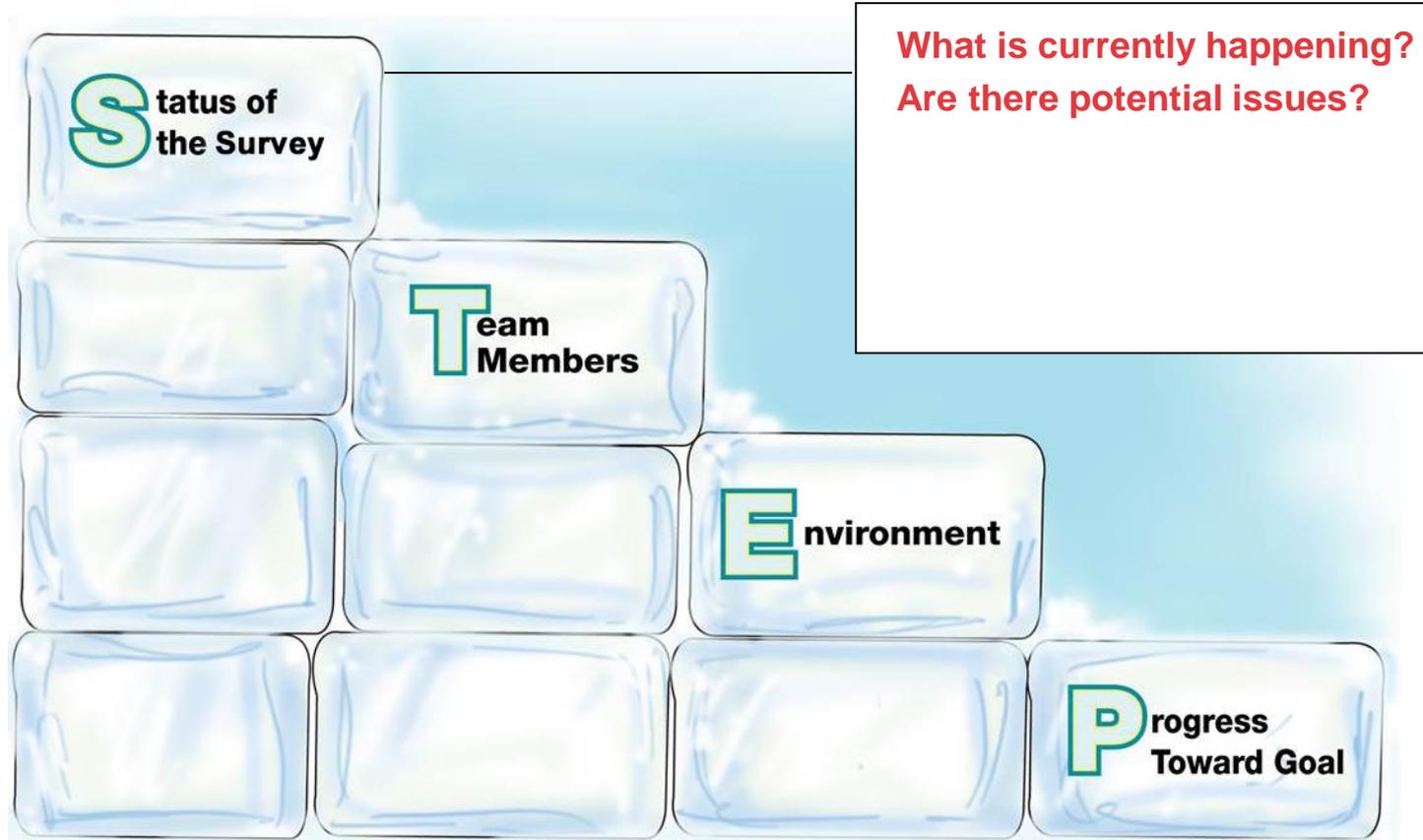
***Mutual performance monitoring has been shown to be an important team competency.***

***(McIntyre and Salas 1995)***

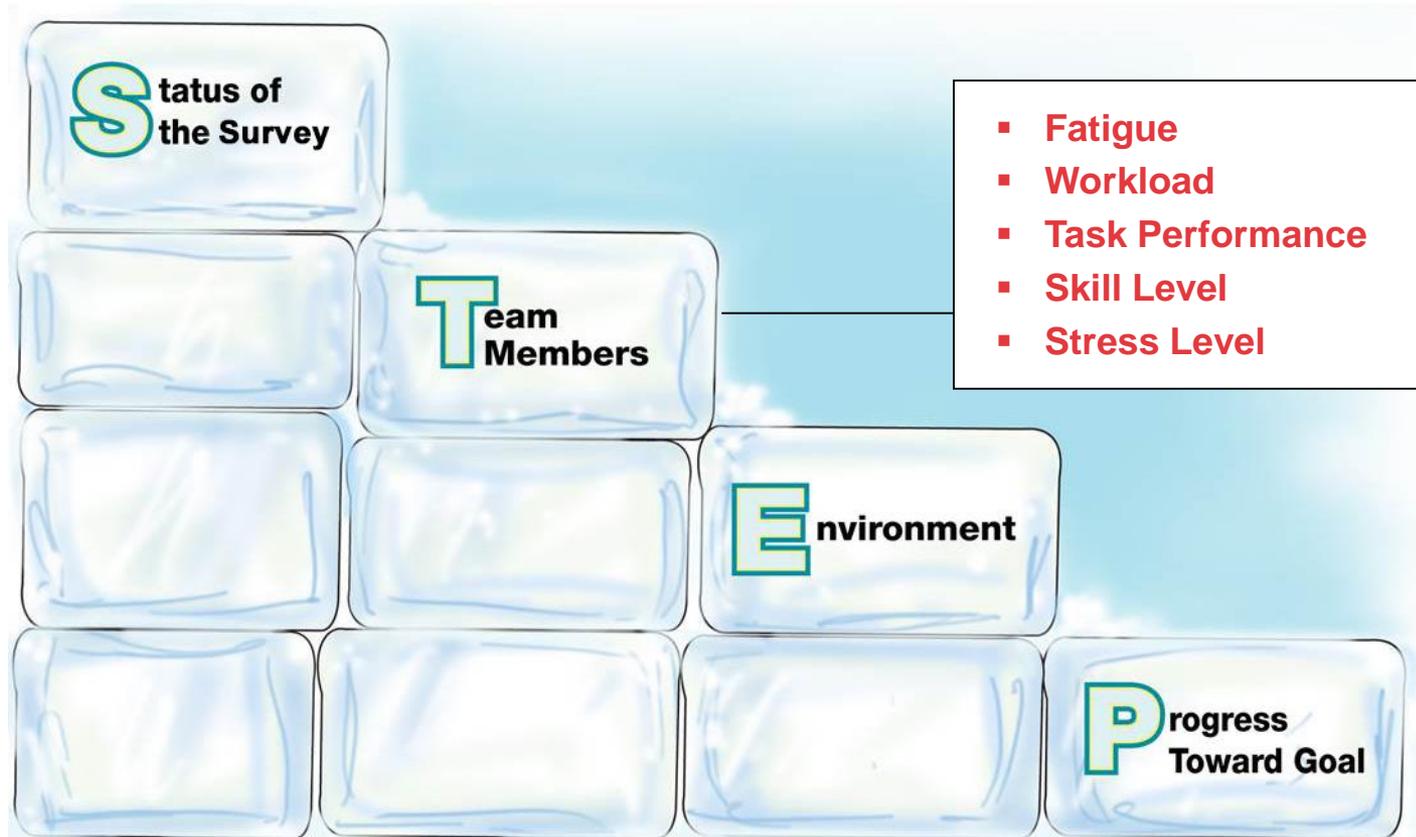
## STEP



# Status of the Survey



# Team Members



# I'M SAFE Checklist

**I** = *Illness*

**M** = *Medication*

**S** = *Stress*

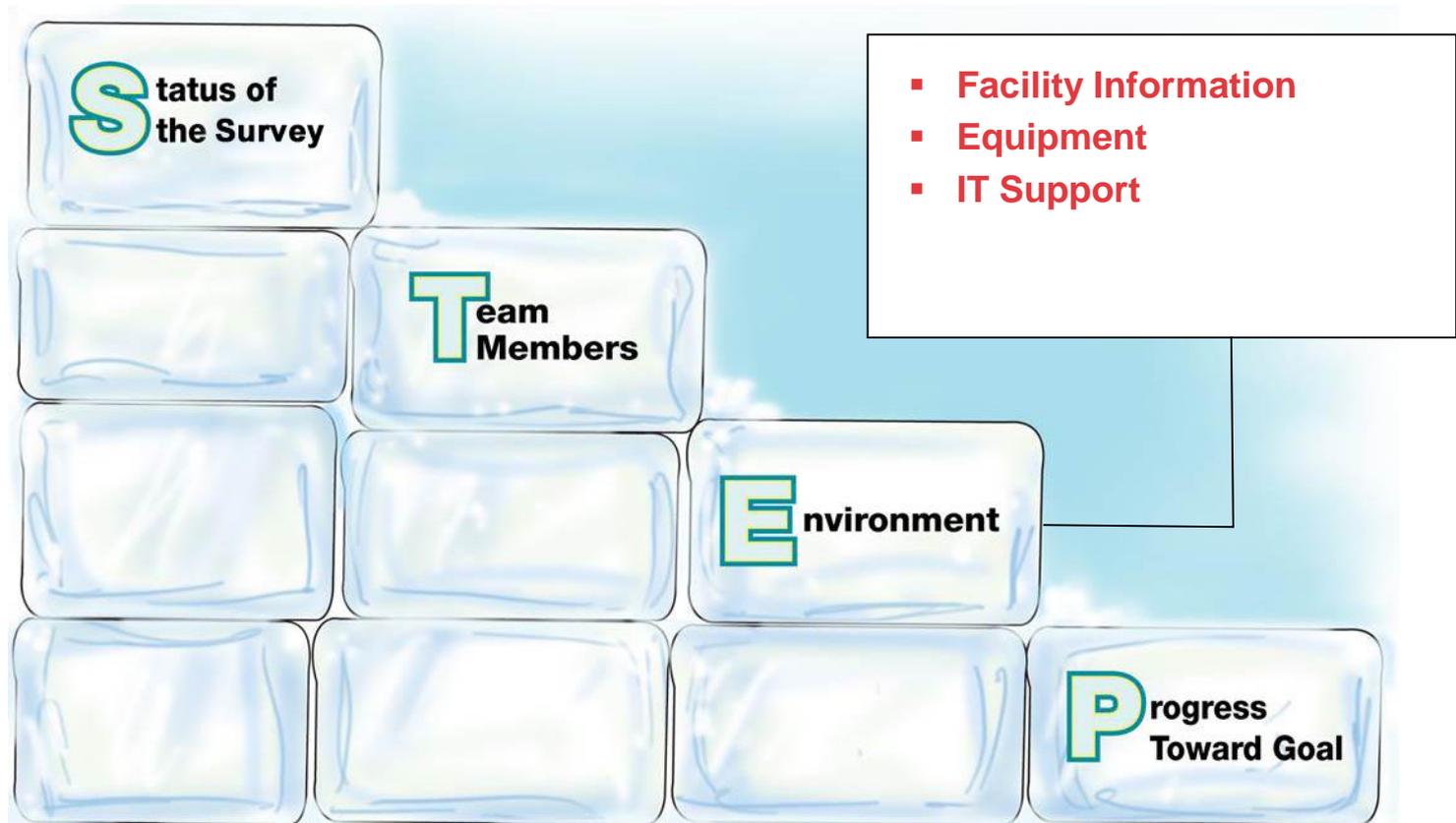
**A** = *Alcohol and Drugs*

**F** = *Fatigue*

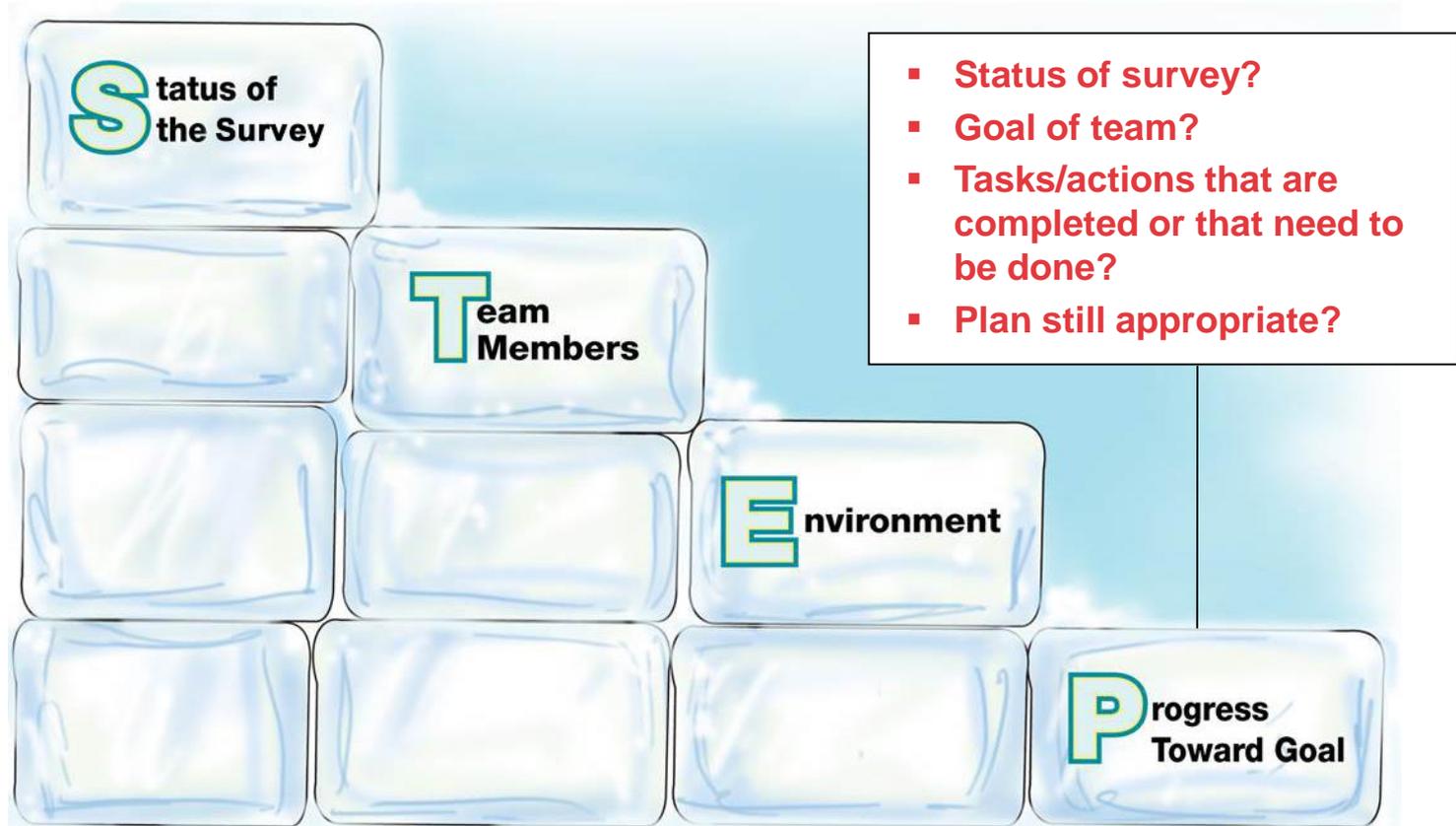
**E** = *Eating and Elimination*

***An individual team member's responsibility ...***

# Environment

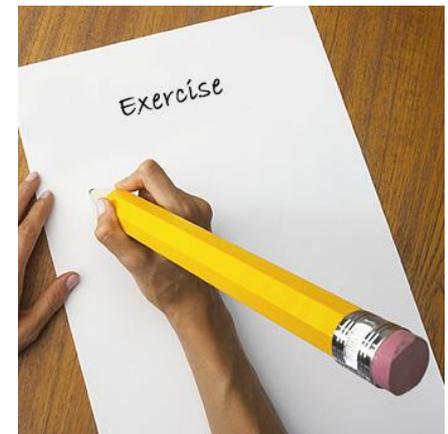


# Progress Toward Goal



# Situation Monitoring

- Recollect examples of situation monitoring, in which you needed to—
  - Be aware of what was going on.
  - Prioritize and focus on different elements of the situation.
  - Share this information with others.
- Select one or two that best represent the concept of situation monitoring.
- Share that information with others.



# Situation Awareness is...

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

- Knowing the status of a particular event.
- Knowing the status of the survey.
- Understanding the operational issues affecting the team.
- Maintaining mindfulness.

# Conditions that Undermine Situation Awareness (SA)

## **Failure to—**

- Share information with the team.
- Request information from others.
- Direct information to specific team members.
- Utilize resources fully (e.g., status board, automation).
- Maintain documentation that is adequate, complete, and timely.

# 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.***



***“Teams that perform well hold shared mental models.”***

***(Rouse, Cannon-Bowers,  
and Salas 1992)***

# Shared Mental Model?

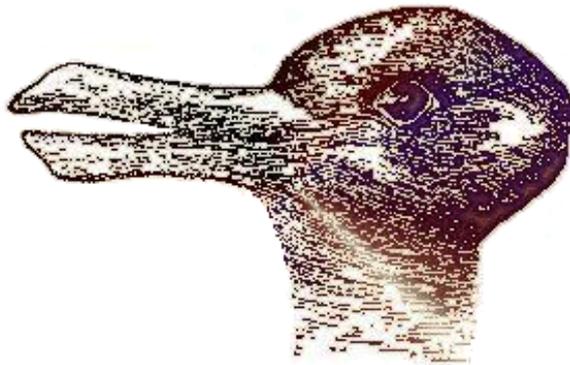


# How Shared Mental Models Help Teams

- Help ensure that teams know what to expect, so if necessary, can regroup to get on the “same page.”
- Foster communication to ensure care is synchronized.
- Ensure that everyone on the team has a picture of what it should look like.
- Enable team members to predict and anticipate better.
- Create commonality of effort and purpose.

***“ Shared mental models help teams avoid errors that place the survey at risk.”***

# What Do You See?



# When to Share?

- Briefs
- Huddles
- Debriefs
- Team meetings

***... Share information as soon as possible when a change occurs in the survey's status.***

# Situation Monitoring

## BARRIERS

- Hierarchical Culture
- Lack of Resources or Information
- Ineffective Communication
- Conflict
- Time
- Distractions
- Workload
- Fatigue
- Misinterpretation of Data
- Failure to Share Information

## TOOLS and STRATEGIES

**Brief**

**Huddle**

**Debrief**

**STEP**

**Cross  
Monitoring**

## OUTCOMES

- Situation Awareness
- Shared Mental Model
- Adaptability
- Team Orientation
- Mutual Trust

# Teamwork Actions

- Conduct team exercises to increase situation monitoring skills.
- Share information in a timely fashion.
- Use cross monitoring.
- Apply the STEP process when monitoring the situation.
- Foster communication to ensure that all members of the team have a shared mental model.
- Share information during briefs, team huddles, debriefs, and team meetings.

***“Teams do not seek consensus; they seek the best answer.”***

***–Katzenbach and Smith***

# Acknowledgments

We would like to acknowledge the following for their assistance:

- Department of Health and Human Services
- Agency for Healthcare Research and Quality