

Table 2. Strategies for Effective Handoffs –
 Identified in articles on U.S. nursing handoffs in the English-language literature, January 1, 1987, to August 4, 2008.

Strategy Categories	
<p>Communication skills</p> <p><i>General communication</i></p> <ul style="list-style-type: none"> Maintain patient and family confidentiality Be concise but thorough in conveying essential information Convey information clearly; ask questions if something isn't clear Keep report patient centered <p><i>Preparation</i></p> <ul style="list-style-type: none"> Manage your time so that you're prepared to give report Gather necessary materials (such as patient charts, your own shift notes) <p><i>Transfer of responsibility</i></p> <ul style="list-style-type: none"> Verify that the person receiving report understands and accepts transfer of responsibility Delay such transfer if there are concerns about patient status or stability <p><i>Language</i></p> <ul style="list-style-type: none"> Speak clearly and at a moderate pace Use clear, specific language Keep all remarks objective; avoid judgmental statements Avoid the use of jargon, acronyms, or abbreviations <p>Standardization strategies</p> <p><i>Standardize the process</i></p> <ul style="list-style-type: none"> Provide opportunity to ask and respond to questions Develop guidelines, tools (templates, forms, checklists, scripts), policies, and procedures Use a tool to ensure that essential information is consistently included Tailor report tools as appropriate for different areas or situations (such as change of shift, patient transfer between units) Report information in the same order every time Use a verification process (such as reading back) to ensure that information is both received and understood Develop a teamwork contract and have team members sign it Use a mnemonic <p><i>During face-to-face communication</i></p> <ul style="list-style-type: none"> Use interactive questioning <p><i>During walking rounds or bedside report</i></p> <ul style="list-style-type: none"> Check equipment Check for missing information or ask additional questions Include patient and family in discussion of plans and goals <p><i>Monitor, evaluate, or audit the process</i></p> <ul style="list-style-type: none"> Create an evaluation tool Use spot checks Provide direct feedback as soon as possible Modify the process as needed Focus on system problems 	<p>Technologic solutions</p> <p><i>Use an electronic (computerized) handoff system</i></p> <ul style="list-style-type: none"> Give report in front of computer (makes it easy to look up relevant information) <p><i>Use an audio- or videotaped report</i></p> <ul style="list-style-type: none"> Plan ahead what you want to say Report information in the same order every time Stop the recorder when necessary to cut out distractions Listen to your taped reports occasionally to identify areas for improvement Ask a respected colleague to critique your report <p><i>Use a telephone-based voice technology system</i></p> <p>Environmental strategies</p> <ul style="list-style-type: none"> Limit interruptions and distractions Create a specific place for report that's well lit and quiet Maintain patient and family privacy Allow sufficient time <p>Training and education</p> <ul style="list-style-type: none"> Use real-life examples (scenarios, stories) in class and "what-if" scenarios during practice Use role-playing to teach effective handoff skills Teach assertiveness and listening skills Address hierarchical and social issues (for example, by discussing how to communicate effectively with those above and below you in the hierarchy, how social and cultural norms affect communication) Discuss and address human factors (such as stress, fatigue, sensory or information overload) Provide adequate refresher training or education Create posters, pocket cards, Web-based resources, and other tools to reinforce handoff skills <p>Staff involvement</p> <ul style="list-style-type: none"> Involve staff in the development of guidelines, tools (templates, forms, checklists, scripts), policies, and procedures Involve staff in the development of a training program <p>Leadership</p> <ul style="list-style-type: none"> Have consistent expectations for compliance Facilitate nurse–physician dialogue to identify problems and find solutions Allow adequate time to plan an implementation strategy for a new handoff process Find early adopters and champions to help demonstrate effectiveness Link the shift handoff process to performance evaluation

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