

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

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