

11-2014

# Standardized Report Format: A Review of the Literature

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## Recommended Citation

Kutzy, M., & Fitzgerald, K. (2014). Standardized Report Format: A Review of the Literature. Retrieved from [http://digitalcommons.wcupa.edu/nurs\\_stuwork/3](http://digitalcommons.wcupa.edu/nurs_stuwork/3)

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# Standardized Report Format:

## A Review of the Literature

Madeline Kutzy, SN WCU and Kathleen Fitzgerald, SN WCU



### What We Learned

The practice of effective communication during a standardized report is crucial in the health care setting. The results are better patient outcomes, fewer sentinel events, and positive relationships between colleagues in the health care field.

#### Background

Hand-off reporting is the information relayed from one health care professional to another at change of shift summarizing a patient's state and plan of care. Standardized hand-off report

- provides effective communication
- ensures crucial information is relayed
- improves patient outcomes
- reduces sentinel events
- contributes to positive relationships

#### Purpose & Aims

- Identify barriers to effective communication
- Identify features that attribute to effective communication
- Examine the influence of patient population on necessary elements of reporting
- Explore how to implement standardized reporting at an institutional level

#### Methods

- Database: CINAHL  
Nursing Journals such as *American Journal of Nursing* and *Journal of Advanced Nursing*
- Search terms: standardized communication, handoff reports, SBAR, barriers and communication
- Published: within past five years (2009-2014)
- Research articles only

#### Results

- Standardized report across an entire institution may not be appropriate
- Institutions must provide proper and efficient teaching on effective communication
- Face to face communication is best

#### Conclusions

Poor report handoffs negatively impact the receiver by reducing his or her ability to make effective decisions and to anticipate events.

#### Next Steps

Additional research

- Where can improvements can be made?
  - Do dangerous trends exist, and where?
- Procedure/policy
- dedicating appropriate amount of time

#### Limitations

- The number of relevant articles found via the database was greatly diminished once the year parameter, which was required for the paper, was applied

Figure 1. The adapted SBAR tool

The adapted SBAR tool form is structured as follows:

- S (Describe SITUATION):** My name is ..... and I work ..... (your service). I need to talk to you about:  an urgent safety issue regarding ..... (name of client),  a quality of care issue regarding ..... (name of client). I need about ..... (minutes) to talk to you, if not now, when can we talk? I need you to know about:  changes to a patient status,  changes to treatment plan, procedures or protocols,  environmental/organizational issues related to patient care.
- B (Provide BACKGROUND):** Are you aware of ..... (specific problem)? The patient is ..... (age) and has a diagnosis of ..... (diagnosis) as well as ..... (diagnosis). He/She was admitted on ..... (date) and is scheduled for discharge on ..... (date). His/Her treatment plans related to this issue to date include ..... (treatment). He/She is being monitored by ..... (specialist) and has appointments for ..... (procedures). This patient/family/staff is requesting that ..... (request).
- A (Provide client ASSESSMENT):** I think the key underlying problem/concern is ..... (describe). The key changes since the last assessment related to the specific concern are:
  - Person Level Changes:**  Vital Signs/GI,  Cardio-Respiratory,  Neurological,  Musculoskeletal/Skin,  Pain,  Medications,  Psychosocial/Spiritual,  Sleep,  Cognitive/Mental Status/Behavioural,  Nutrition/Hydration.
  - Activity/Participation/Functional Changes:**  ADL,  Transfers,  Home/Community Safety.
  - Environmental Changes:**  Organizational/Unit Protocols/Processes,  Discharge Destination,  Social/Family Supports.
- R (Make RECOMMENDATION):** Based on this assessment, I request that:  we discontinue/continue with .....,  we prepare for discharge OR extend discharge date,  you approve recommended changes to treatment plan/goals including .....,  you reassess the patient's .....,  the following reassessments be completed by .....,  the patient be transferred out to.../be moved to .....,  you inform other team members/family/patients about change in plans,  I recommend that we modify team protocols in the following ways .....

To be clear, we have agreed to... Are you ok with this plan?  
 I would like to hear back from you by .....,  
 I will be in contact with you about this issue by .....