

The What, Why, and How of Bedside Shift Report and Patient Bedside Whiteboards

Roles of the patient and care providers.

Six-part safety check.

Plan and prepare for implementation.





1. Welcome

Welcome to The What, Why, and How of Bedside Shift Report and Patient Bedside Whiteboards.

This document is a print-friendly version of the elearning unit. Here you will find a screenshot of each page in the unit (left column), and a transcript of the voiceover (this column). While this document lacks interactivity, it may be preferred by some learners who prefer reading or lack a robust internet connection.



2. Project collaborators

This project is a joint initiative between Alberta Health Services and the University of Alberta.

Elearning tips

Social and solo learning.

You may work through this unit with other participants.

Timing.

Set aside a specific time to complete this unit and use the full time.

Sights and sounds.

Adjust your screen brightness and your audio volume to comfortable levels.

Transcript.

A transcript of each screen is available in the left panel.

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3. Elearning tips

A quick reminder that you are welcome and encouraged to work through this elearning unit with other participants if you wish, and a transcript is available in the left panel.

Learning objectives

Upon completion of this elearning unit you will be able to:

- Recognize the cornerstones of Bedside Shift Report;
- Identify the roles of the patient, incoming nurse, and outgoing nurse at the bedside;
- Recall the safety elements that may be checked at the bedside during the transfer of care;
- Collaborate with other staff members in planning for and implementing Bedside Shift Report and Patient Bedside Whiteboards.

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4. Learning objectives

Upon completion of this elearning unit you will be able to:

- Recognize the cornerstones of Bedside Shift Report;
- Identify the roles of the patient, incoming nurse, and outgoing nurse at the bedside;
- Recall the safety elements that may be checked at the bedside during the transfer of care; and
- Collaborate with other staff members in planning for and implementing Bedside Shift Report and Patient Bedside Whiteboards.

What is Bedside Shift Report?

Brief, standardized communication

Transfer of accountability (TOA) at nursing shift change

Takes place at the patient bedside

Involves the patient and family

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5. What is Bedside Shift Report?

Bedside Shift Report is a brief, standardized method for conducting the transfer of accountability (or TOA) during the nursing shift change.

Bedside Shift Report moves the location of the shift report from the report room to the patient's bedside, and involves the patient and their family.

Why Bedside Shift Report?

Why might Bedside Shift Report be beneficial to frontline staff, or patients, or both?

See if you can come up with at least 5 reasons.

Click NEXT when you're ready to continue.

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6. Why Bedside Shift Report?

Take a moment and think about why Bedside Shift Report might be beneficial to frontline staff, or patients, or both. See if you can come up with at least 5 reasons.

If you're doing this elearning unit with colleagues, discuss the question and come up with a list together.

Click Next when you're ready to continue.

Why Bedside Shift Report?

BEDSIDE SHIFT REPORT ...

- Facilitates regular communication between the incoming nurse, outgoing nurse, and patient
- Promotes a culture of collaborative practice
- Invites patients to be active partners in their care
- Builds rapport and trust
- Reassures and informs patients
- Saves time

ALLOWS FRONTLINE STAFF TO ...

- Meet the patient early and face-to-face
- Confirm patient status at change of shift
- Perform safety checks (covered later in this unit)
- Identify emerging issues

AND ...

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7. Why Bedside Shift Report?

As you may have found, there are many reasons for Bedside Shift Report. Did any of these make your list?

See Appendix A for this list of reasons for Bedside Shift Report.

Patient-centred care

Bedside Shift Report promotes patient-centered care by involving patients and families more directly in care decisions.

It improves patient safety and increases patients' involvement in communicating their goals for care planning.



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8. Patient-centred care

Bedside Shift Report promotes patient-centered care by involving patients and families more directly in care decisions. It improves patient safety and increases patients' involvement in communicating their goals for care planning.

Cornerstones of Bedside Shift Report

- Make introductions
- Explain process to patient
- Seek agreement to participate

- Review status and plan of care
- Review and update whiteboard

- Complete a safety check

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9. Cornerstones of Bedside Shift Report

Partnership. Everyone is introduced and the shift report process is explained to the patient. The patient is given the choice to participate.

Transparency. The patient's status and plan of care are clear to everyone, and the whiteboard in the patient's room is updated.

Accountability. A six-part patient safety check is completed.

What might Bedside Shift Report look like?

▶ CLICK TO PLAY

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10. What might Bedside Shift Report look like?

Go to <https://www.youtube.com/watch?v=bt1lFuHNjO0> to view the video. The video is 6 minutes long.



11. Bedside Shift Report Roles

The outgoing nurse:

- Introduces him or herself with Name, Occupation, and Duty (NOD)
- Explains that their shift is over
- Asks for consent to give the report at the patient's bedside. Patients can opt out of Bedside Shift Report at any time if they aren't comfortable or only want certain information shared in the presence of others.
- Always respect the patient's choice.
- Introduces the incoming nurse using Name, Occupation, Duty
- Gives information on the patient: Diagnosis, current status, care goals, abnormal lab values to monitor, tests, appointments, and plan for the day, any significant changes over the past shift

The incoming nurse:

- Conducts the six quick safety checks discussed later in this elearning unit
- Asks the patient if there's anything they'd like to add or ask

The patient, and family member if present:

- Contributes any additional information they may have
- Asks any questions they may have

Tip

- Throughout the report, keep voices low to respect the patient's privacy and comfort.

Your role in Bedside Shift Report

Find this handout called *Your role in Bedside Shift Report!* in the Resources list (top right).



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12. Your role in Bedside Shift Report

See Appendix B for this handout.

Six-part safety check



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13. Six-part safety check

You're the incoming nurse! Can you identify the six parts of the safety check? List the places you need to check, or circle them in this image.

See Appendix C for the answers.

What are Patient Bedside Whiteboards?

Tool to facilitate communication with patients and families
Information about care providers, care goals, etc.
Updated throughout the day



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14. What are Patient Bedside Whiteboards?

Patient Bedside Whiteboards are whiteboards used to facilitate communication with patients and families.

All care providers who see the patient regularly should write their name and discipline on the whiteboard, at the beginning of their shift.

Whiteboards should be updated after Rapid Rounds and throughout the day as needed.

What goes on the Patient Bedside Whiteboard?

Today is June 24

Activities

- ~ OT visit at 11 am
- ~ Grandkids visiting after school

Goals

- ~ Up in chair for all meals
- ~ Walk around the unit three times

Doctor Dr. R. Patil

Nurse Alexandra

OccTher Edis

ADOD June 29

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15. What goes on the Patient Bedside Whiteboard?

- Today's date, updated daily in the morning.
- The name of the most responsible physician or resident, updated on admission and transfer between most responsible physicians.
- The name of the RN.
- Names of other care providers.
- The Anticipated Date of Discharge, updated on admission and as it changes thereafter.
- Today's schedule, updated daily.
- The patients' care goals for today, updated daily.

Units may include additional information that best represents the needs of their patients. For example, a surgery unit may add data that differs from what might be seen on a stroke unit or a general medicine unit.

Why Patient Bedside Whiteboards?

Keep the patient up to date on their care team and care plan.

Patients and families can be an active part of the care team.

Improved patient and family experience.

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16. Why Patient Bedside Whiteboards?

A Patient Bedside Whiteboard keeps the patient up to date on the members of their care team, the plan for the day, and their Anticipated Date of Discharge (ADOD).

Through the Patient Bedside Whiteboard, patients and families can be an active part of the care team. This leads to an overall improved patient and family care experience.

Cornerstones of Patient Bedside Whiteboards

PARTNERSHIP

- Easily viewed by patient, but not by public
- Patient can add info, ask questions



- Reviewed and updated at shift change and after rounds

- Who is involved in care
- Plan for the day
- Care goals
- Anticipated Date of Discharge

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17. Cornerstones of Patient Bedside Whiteboards

Partnership: Whiteboards are visible to the patient. Patients and families can also add questions or information to the board and they should be encouraged to do so.

Transparency: Whiteboards clearly state the care plan and who is involved in care.

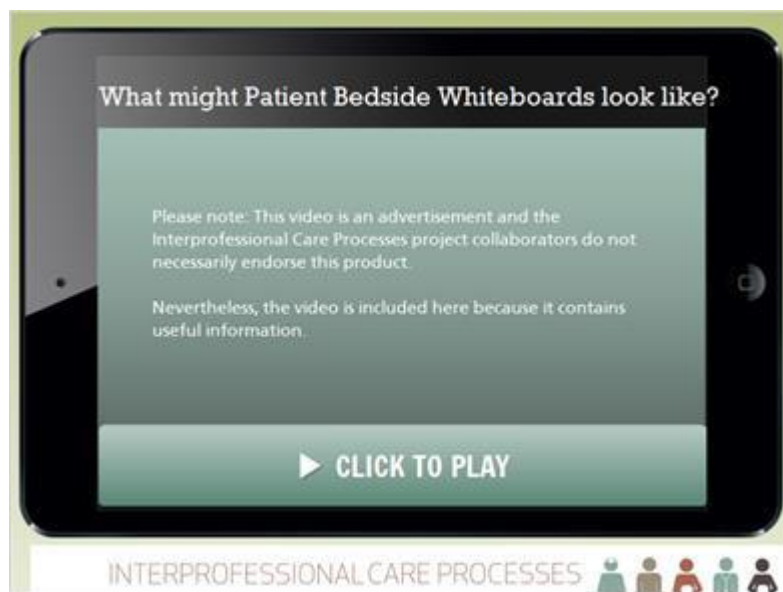
Accountability: Whiteboards are reviewed and updated at each shift. It's important that all information on the Whiteboard is accurate and up to date.



18. Privacy

The Information and Privacy Department has these recommendations:

- Always use the “least amount of information” principle.
- Use first names for nursing staff and other disciplines.
- Place the Patient Bedside Whiteboard so it does not face the public but can still be easily seen by the patient.
- Use discretion when writing down medical information such as diagnoses, tests, and so on.



19. What might Patient Bedside Whiteboards look like?


Go to <https://www.youtube.com/watch?v=N6AnIb5VRY> to view the video. The video is 1.5 minutes long.

Please note: This video is an advertisement and the Interprofessional Care Processes project collaborators do not necessarily endorse this product.


Nevertheless, the video is included here because it contains useful information.

Patient Bedside Whiteboard roles

CARE PROVIDERS	PATIENT/FAMILY
<ul style="list-style-type: none"> • Respect patient choice • Add name, discipline, etc. • Update today's date and ADO • Ensure board is accurate • Add information about care plan 	<ul style="list-style-type: none"> • Give consent to use board • Read and contribute to board content



TIP Every member of the team updates the whiteboard as needed

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20. Patient Bedside Whiteboard roles

The patient and family:

- Give consent for providers to use the Patient Bedside Whiteboard
- Read and contribute to the board's contents

Care providers:

- Respect the patient's choice to use the whiteboard
- Add their name, discipline, and other relevant information
- Update the Anticipated Date of Discharge after Rapid Rounds
- At the beginning of each Bedside Shift Report, ensure the information on the whiteboard is accurate and up to date
- Add information about the care plan, including upcoming tests and appointments

Tip:

- Every member of the care team should update the Patient Bedside Whiteboard on every shift, and as needed.

21. Sample whiteboards

Here are two sample whiteboards.

Sample whiteboard

Room & Bed #	10-2	My goals for today
Today's Date	July 31, 2015	Walk 2 laps around the unit
ADOD	< 3 days	
Nurses	Sam and Virginia	Patient and family messages
Physician/Resident	Dr. Lincoln	My ride home is my son Jim. His cell is 780-999-1111.
Team Members	TA Rupert	Have a great day, Mom! ❤️ -Lacey
Mobility	Indep (SBA) 1 2 Lift	
Fall Risk	Low Med High	
Today's Schedule	0900 Physio 1300 Test	

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Sample whiteboard

Room & Bed #	8-11	My goals for today
Today's Date	July 31, 2015	• Use incentive spirometer every hour
ADOD	< 5 days	• Sit up in chair 30 mins x3 today
Nurses	Lara and Jeff	Patient and family messages
Physician/Resident	Dr. Shepard	I brought my mom new slippers. They're in the closet.
Team Members	PT Zaeed, OT Kasumi	I'll be back at 5pm -Tali Cell: 780-111-9999
Mobility	Indep (SBA) 1 2 Lift	
Fall Risk	Low Med High	
Diet	Cut, diced, nectar, thick fluids	
Today's Schedule	0900 Physio 1400 OT	

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Collaborative planning



Unit-specific info

What unit-specific information should be shared on the whiteboard?



Whiteboard placement

Where can the whiteboards be placed so they are easily viewable for patients?



Patient orientation

How do we let every patient entering our unit understand the whiteboard and how they can play a role in their care?



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22. Collaborative planning

As you move forward in planning for Patient Bedside Whiteboards on your unit, consider these questions:

- What unit-specific information should be shared on the whiteboard?
- Where can the whiteboards be placed so they are easily viewable for patients?
- How do we let every patient entering our unit understand the whiteboard and how they can play a role in their care?

Review



Bedside Shift Report is a brief, standardized method for conducting the transfer of accountability during the nursing shift change.



The outgoing nurse asks the patient for consent, introduces the incoming nurse, and states the patient's status. The incoming nurse conducts six safety checks. The patient contributes info and asks questions.



The six safety checks are: IV site and fluids, allergy band, bed rails, bed alarm, bed height, and call bell.

Note: Modules 4-6 provide opportunities to practice Bedside Shift Report scenarios and relevant communication tools.

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23. Review

Let's review what we've learned in this unit.

- Bedside Shift Report is a brief, standardized method for conducting the transfer of accountability during the nursing shift change.
- The outgoing nurse asks the patient for consent, introduces the incoming nurse, and states the patient's status. The incoming nurse conducts six safety checks. The patient contributes information and asks questions.
- The six safety checks are: IV site and fluids, allergy band, bed rails, bed alarm, bed height, and call bell.

We'll revisit Bedside Shift Report, and have an opportunity to practice Bedside Shift Report scenarios, in the facilitated group learning sessions that follow the elearning units.

Review



Patient Bedside Whiteboards facilitate communication between care providers and patients and their families.



The boards contain information about the care providers and care plan. Care providers update the boards daily, at a minimum.



When implementing Patient Bedside Whiteboards, consider your unit-specific needs, appropriate placement of whiteboards, and how to orient patients to the boards.

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24. Review

- Patient Bedside Whiteboards are a tool to facilitate communication between care providers and patients and their families.
- The whiteboards contain information about the care providers and care plan. Care providers update the boards daily, at a minimum.
- When implementing Patient Bedside Whiteboards, consider your unit-specific needs, appropriate placement of whiteboards, and how to orient patients to the boards.

Reflection

Regarding Bedside Shift Report and Patient Bedside Whiteboards:

How might fully engaging in these processes change my relationship with my patients and colleagues?

What are the implications for how I do my job, for my role in patient care?

How will these processes affect me and enhance my practice?

What questions do I have, and how will I obtain the answers?



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25. Reflection

Using what you've learned in this elearning unit, take a moment and reflect on these questions or discuss them with your colleagues.

- Regarding Bedside Shift Report and Patient Bedside Whiteboards:
- How might fully engaging in these processes change my relationship with my patients and colleagues?
- What are the implications for how I do my job, for my role in patient care?
- How will these processes affect me and enhance my practice?
- What questions do I have, and how will I obtain the answers?



26. Thank you

Thank you for completing The What, Why, and How of Bedside Shift Report and Patient Bedside Whiteboards.

For more information about collaborative practice and this elearning unit, please visit the Virtual Interprofessional Educator Resource (VIPER):

<http://www.hserc.ualberta.ca/TeachingandLearning/VIPER/>



27. Acknowledgements

See Appendix D for acknowledgements and image credits.

Appendix A: Why Bedside Shift Report?

Bedside Shift Report:

- Facilitates regular communication between the incoming nurse, outgoing nurse, and patient
- Promotes a culture of collaborative practice
- Invites patients to be active partners in their care
- Builds rapport and trust
- Reassures and informs patients
- Saves time

Bedside Shift Report allows frontline staff to:

- Meet the patient early and face-to-face
- Confirm patient status at change of shift
- Perform safety checks (covered later in this unit)
- Identify emerging issues

Bedside Shift Report promotes patient-centered care by involving patients and families more directly in care decisions. It improves patient safety and increases patients' involvement in communicating their goals for care planning.

Appendix B: Your role in Bedside Shift Report

Your role in Bedside Shift Report!

OUTGOING PROVIDER

- Use NOD (Name-Occupation-Duty) to introduce incoming nurse
- Outline purpose of report and seek patient permission to proceed
- Provide status update, review orders and plan of care

PATIENT AND FAMILY

- Advocate for own comfort level when discussing care
- Clarify and correct information as needed
- Ask questions



INCOMING PROVIDER

- Review chart
- Clarify information as needed
- Complete safety checks
- Conduct quick physical exam, if needed
- Update whiteboard

BOTH PROVIDERS

- Be mindful that the patient may not want sensitive information discussed in front of others
- Confirm patient understanding and invite questions
- Thank patient

Appendix C: Six-part safety check



Answers:

1. IV site and fluids are correct
2. Allergy band is in place*
3. Bed rails are used*
4. Bed alarm is in use*
5. Bed is at lowest height
6. Call bell is within reach

*If applicable

Appendix D: Acknowledgements

These materials were produced for *Better Teams, Better Care: Enhancing Interprofessional Care Processes through Experiential Learning (Interprofessional Care Processes Project)*.

This project is a joint initiative of Alberta Health Services and the University of Alberta, in partnership with Covenant Health, and funded by Alberta Health.

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For more information about collaborative practice and this elearning unit, please visit the Virtual Interprofessional Educator Resource (VIPER): www.hserc.ualberta.ca/TeachingandLearning/VIPER/

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