



IMPROVING COMMUNICATION WITH

# ELECTRONIC SBAR REPORTS

myrounding<sup>®</sup>

By David Arthur Marshall

Copyright © 2016 My Rounding Solutions, LLC. All rights reserved.  
Printed in the United States of America.

Additional copies of this booklet can be ordered from MyRounding.  
MyRounding products are available at special quantity discounts for  
training and educational purposes. To learn more about this or other  
training products, contact our program and product specialists:

Telephone: 877-503-9226

[www.MyRounding.com](http://www.MyRounding.com)

The **Situation, Background, Assessment and Recommendation (SBAR)** technique is used by healthcare

organizations worldwide as a standardized communication model to deliver information in a structured format. SBAR supplies a concise and accurate framework to deliver relevant data that's required to make a decision or to effect a change in procedure. Hospitals, practices and other healthcare organizations around the world have significantly increased safety and quality through SBAR. Streamlining information in this way reduces the likelihood of poor communication, which is the primary cause of medical errors.

Traditionally, SBAR has been used as an informal tool when meeting with a team member about a patient's condition or other situation that requires immediate attention. Even when prepared in writing, this communication may not be recorded. SBAR tools devised for certain clinical situations such as handoffs are often considered by staff as too time-consuming to be completed properly. Hence, these reports go mostly unread, and the SBAR tools remains underutilized. The MyRounding application is purpose-built to streamline this type of communication and maximize the effectiveness of this evidence-based process.



## USING SBAR FOR INITIATIVES

SBAR has applications beyond that of delivering critical patient information, although addressing such issues effectively can help improve patient satisfaction and HCAHPS scores. SBAR can also be used in a variety of situations, both clinical and non-clinical, that require a thoughtful review of process and follow-up. SBAR can call attention to literally any situation, whether clinical handoffs, process improvements, initiative requests, physical plant changes, and so on.

SBAR can also play a role in improving the operations of an organization that's in the midst of a process improvement, patient or staff satisfaction program or other initiative. By enabling team members to report any situation, SBAR can benefit a unit or an entire organization by helping document and implement necessary changes. This type of structured report can raise problems or concerns impacting floor, unit or building conditions, overlooked errors, or ineffective policies and procedures.

SBAR information can be easily entered into an electronic template that's embedded in an organization's rounding platform (such as MyRounding). Benefits of this approach include:

- The organization maintains a central repository for SBAR reports. Each report can be sent automatically to a central database so that the organization can track ongoing problems, spot trends and work on improving a situation that affects safety, efficiency and effectiveness.
- The organization can highlight problems and trends for later analysis. The report can be emailed to certain team members for reference and discussion during regular meetings, as well as flagged as an actionable message in the database.
- The organization can manage accountability of who created the SBAR and who was responsible for its execution. This will help the organization identify those team members who need additional training and coaching on SBAR.
- The organization can document an issue, include images and voice recordings, and enable email follow-up.

As a result, the organization can keep a record of the situation, address it immediately and track its progress.

*The organization can document an issue, include images and voice recordings, and enable email follow-up.*



## THE RATIONALE FOR SBAR

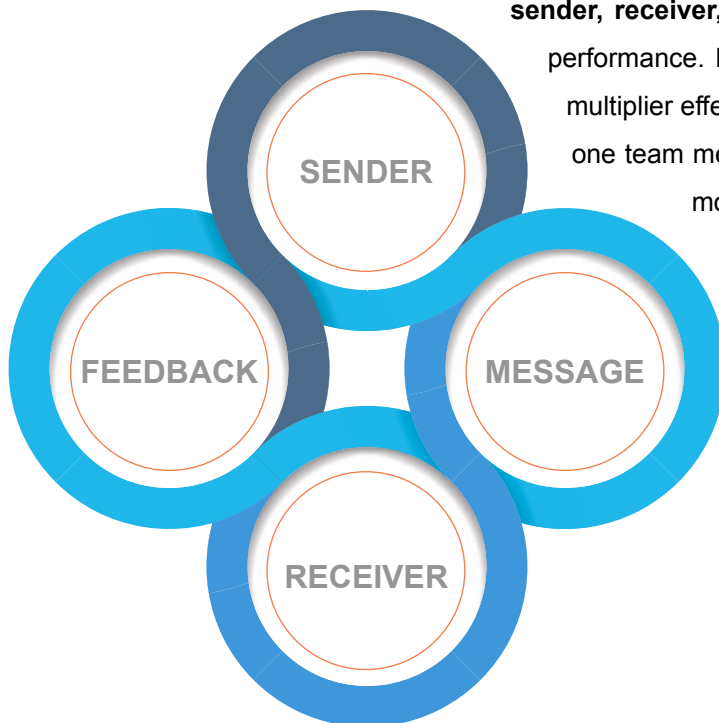
*SBAR reports can provide a multiplier effect that pinpoint serious problems.*

Not all attempts at improving performance levels provide the same excellent results as SBAR. An organization may frequently introduce new initiatives and programs to improve its safety and satisfaction record. But some of these initiatives and programs are “quick fix” approaches that don’t address deeper changes needed to improve communication and teamwork. On the other hand, SBAR isn’t one of these “come and go” initiatives. Rather, it’s a skill that must be developed and maintained. But the technique is easy to learn, remember and use regularly, even when team members are under extreme stress.

What also makes SBAR different is its history: It was adapted from a similar program developed by the U.S. Navy for use on nuclear submarines. After alerting the captain during a crisis, a crew member would provide a succinct report about what the situation was and what was required. This report needed to be consistent, complete, accurate and unambiguous—in the same way that critical information must be delivered within healthcare teams.

An electronic SBAR “round” reduces the frequency of communication breakdowns by ensuring that all four essential components of effective communication—

**sender, receiver, message and feedback**—are operating at peak performance. Not only that, similar SBAR reports can provide a multiplier effect that pinpoint serious problems. When more than one team member sends a report about the same problem, it’s more likely to be addressed immediately.



## HOW TO USE SBAR

Unless a report is standardized, it may be difficult for others to realize that a situation exists. On the other hand, SBAR provides a predictable, repeatable model for all members to use and understand. SBAR increases overall operational excellence, creates an environment in which a team can work together more effectively and, most important, calls attention to situations that need to be addressed in a timely manner.

You practice SBAR by quickly organizing the information you want to deliver into the four elements (Situation, Background, Assessment and Recommendation). Only the most relevant data is included, and everything irrelevant or of secondary importance is excluded. When an SBAR report is filed for team members to read and consider, it can be referred to during patient handoffs, transfers and transports; executive or nurse rounding sessions; meetings and daily huddles; and in unit assessments and improvement reports.

### The four elements can be described as follows:



1. Start SBAR by entering the Situation, which is a brief statement of the key issue. It answers the question, “What is the situation I want to address?” It provides information about the situation that needs attention. Identify yourself and your unit in the appropriate fields, then briefly enter what the problem is, when it happened or started, and how severe it is. Let’s say you want to call attention to the ambient noise level in the ED reception area. For example, the Situation might be, “The amount of noise in ED reception has been so loud lately that even the patients are complaining about it.”



2. Next, enter the Background, which delivers in a concise way all information pertinent to the Situation. It answers the question, “What led us to this situation?” The Background should include a history of the problem and how it evolved to the state that it is now. For example, the Background might be, “We use a PA system to announce the patient’s name, which sometimes interrupts an intake nurse’s interview. ED doctors often hold discussions with each other in the reception area. Loud beeping from the new metal detector is constant. The administrator began piping in soft rock music overhead, which one day last week increased in volume...”







3. Next, enter the Assessment, which is your best judgment about the cause or potential effect of the problem. You must be direct instead of hinting about it and hoping the reader understands what you really mean. The Assessment answers the question, “What is going on?” Give your best evaluation of the situation based on the background information you provided. The Assessment in the example might be: “Because of the increased noise level, we might be unintentionally causing mistakes and irritating patients who are waiting for treatment.”



4. Finally, enter the Recommendation. This is your suggestion on how to proceed to address or solve the problem. It answers the question, “What do I want to happen next?” Possible recommendations in this example might include: “I suggest that we reduce the volume of the music (or not have music at all) and to keep the reception area for patients and ED reception staff only.” Even if your recommendation isn’t the ultimate answer, you still provide value in the way you report the problem so that it can be addressed.

Before SBAR can become a technique that’s natural to use, you should practice it as often as possible when you have time to reflect on the information. If you are in a hurry, leaving out information in the report doesn’t save time; in fact, it might increase misunderstanding among team members. **Here are a few tips to help you prepare an SBAR report:**

1. Before entering anything, organize the information in your mind into the four SBAR elements. Never skip any SBAR element or place information in the incorrect element’s field.
2. Don’t prepare a report when you aren’t being mindful about the process. Remove distractions that hinder concentration. Also, distribute and use visual reminders and tools to help organize your thoughts. Put SBAR posters on walls in critical areas to help you and others complete a report.
3. Whenever possible, avoid interruptions while entering a report, such as eating lunch, reading patient charts or having conversations with other staff.



## DEPERSONALIZING COMMUNICATION STYLES

*SBAR  
depersonalizes  
communication  
and bypasses  
personal styles,  
especially those  
learned in training.*

There are many ways to send and receive critical information, but too often these result in poor communication—leading to misinterpretation, confusion or worse. However, SBAR has proven valuable in preventing misunderstandings. It reduces the effect that personal communication styles, from either a sender or a receiver, may have on the message. Such styles, which arise from a team member’s personality, culture, education and/or experiences, can vary widely.

For example, ineffective styles might include using vague or incorrect comments about initiatives (“the new satisfaction rules”), providing irrelevant data, or omitting important information. A poorly worded report may result in confusion or uncertainty about what to do concerning a situation, or it could cause a serious error.

SBAR depersonalizes communication and bypasses personal styles, especially those learned in training. In general, nurses are taught to report in narrative form, while physicians are often taught to use brief “bullet points” that provide key information. SBAR bridges this gap because the sender must deliver information in a standardized format that the receiver also recognizes and uses. This focuses both the sender and the receiver in a nonjudgmental fashion on the problem and the common goal, directing attention to what is right, not who is right.

For example, when delivering information in an SBAR format, you:

- communicate through standardized statements and language that are respectful and assertive.
- respond to feedback by providing additional information, also formatted in one or more of the four SBAR elements
- enhance the urgency of your message and your understanding of it through references to established procedures and best practices





## FILING AN SBAR REPORT

SBAR is a valuable tool that any team member, from night shift nurse to senior administrator, can and should adopt. Any problem they report must be considered of equal importance to the organization, regardless of their position. An SBAR report is not an anonymous message left in the suggestion box that rarely gets reviewed. Rather, the team member who composes the report must be identified, as does the person who reviews it. The report might include checkboxes or drop-down menus with categories of level of importance, type of problem, number of occurrences observed, time, location and other parameters.

Filed SBAR reports become part of the organization's records, and they must be reviewed as soon as possible. Each situation must be addressed and followed up to ensure that it has been resolved or placed under consideration. Also, the manager or administrator in charge of handling the reports is responsible for closing the loop with the team member by communicating any action that will be taken or explaining why it can't be taken.

All staff must use SBAR at every opportunity to raise issues in their units or in the organization. In fact, the quality of an SBAR report is directly proportional to the number of times a staff member completes one: The more often they use SBAR, the more effectively they can deliver pertinent information to improve process, quality and safety. Not only should they use SBAR when necessary, but they must also support others by showing how to prepare the template for a brief and accurate report.

Some team members may not wish to file an SBAR report because it requires preparing and organizing information in advance. They feel they don't have the time, or they hope others will spot the same problem and report it. So, when staff have access to an electronic SBAR reporting tool, they must be trained and motivated to file reports as necessary. Because all reports are received centrally, the organization is informed about who is using SBAR and who isn't, and what measures must be taken to increase usage.

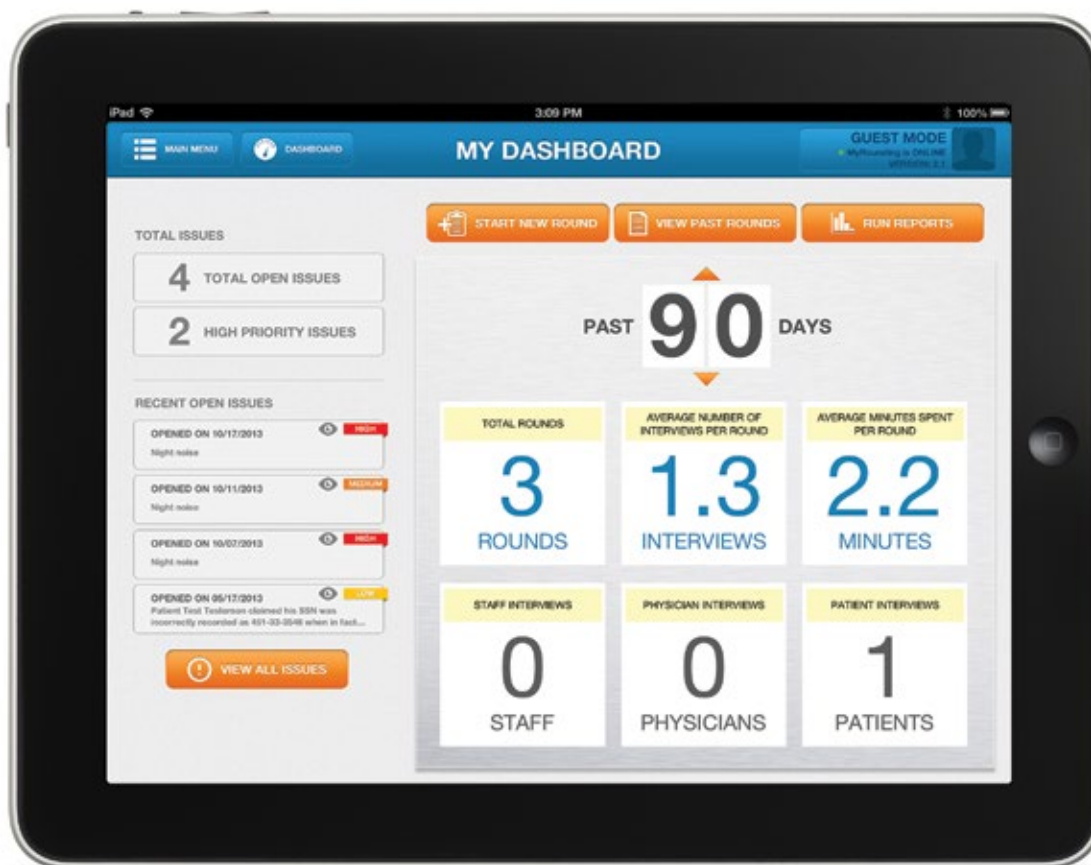
*The more often they use SBAR, the more effectively they can deliver pertinent information to improve process, quality and safety.*





## MYROUNDING FOR SBAR

The MyRounding application is the perfect mobile solution for collecting, analyzing and acting upon SBAR. At its core, MyRounding provides an easy to use platform for electronically entering the Situation, Background, Assessment and Recommendation. Using voice-to-text, staff can quickly articulate the situation for sharing across the organization. SBAR issues created within MyRounding will be logged with time and date stamps and time-to-resolve metrics can be tracked. After an SBAR is created, multiple team members can be alerted. When the situation is resolved, that resolution is captured and shared with everyone involved. At the end of the week, month or year, SBARs from across the organization can be reviewed, trended and categorized for root-cause analysis and process improvement. Capturing SBAR within MyRounding eliminates paper, miscommunication and produces previously unavailable metrics for hardwiring high reliability.



## CONCLUSION

---

Although it's a standardized tool, SBAR can be customized for an organization's needs. In addition, all staff, including administrators, supervisors and other personnel, can use SBAR to deliver critical information concisely. Unless a message is standardized, other staff may find it difficult to read or evaluate. This is particularly the case if one team member is too intimidated to identify a concern directly, regardless of whether that concern poses a risk to process, safety and satisfaction. On the other hand, SBAR provides a predictable, repeatable model for all members to use and understand.

However, for all its benefits, SBAR requires cultural change from the top of the organization on down, as well as considerable training and daily practice. Most importantly, SBAR requires changing the entrenched attitudes in an organization about how members at a lower level communicate with those at a higher level. Such a policy of openness must be communicated at the start of implementing an electronic SBAR program. That's because SBAR requires frank and honest communication among all members of the organization, regardless of their rank or position.



*All staff, including administrators, supervisors and other personnel, can use SBAR to deliver critical information concisely.*

The logo for MyRounding, featuring the word "myrounding" in a lowercase, blue, sans-serif font with a registered trademark symbol (®) to the upper right of the "g".

myrounding®

**SET UP A DEMO:**

We'd love to share how MyRounding can help your organization.

Online: [www.myrounding.com/demo](http://www.myrounding.com/demo)

Call: 877-503-9226

Email: [info@myrounding.com](mailto:info@myrounding.com)