Shadowing Another Professional Tool

**Problem Statement:** Health care delivery is a multidisciplinary practice that requires coordination of care among different professions and provider types. However, health care providers often do not understand other disciplines’ daily responsibilities, teamwork, and communication issues, which inhibits the effective coordination of patient care.

**How does shadowing another professional benefit the participant?** Shadowing another clinician will allow the shadower to gain a broader perspective on the role that staff in other professions play in patient care. The shadower will observe oral and written communication practices and problems and the effect they have on collaboration and teamwork. Shadowers will be able to identify communication and teamwork defects that may lead to poor patient outcomes.

**Purpose of tool:** This tool offers a structured approach to identify and then improve communication, collaboration, and teamwork defects among different practice domains that affect patient care delivery.

**Who should use this tool:**

* All staff involved in the delivery of patient care in units with poor Safety Attitude Questionnaire scores for teamwork and safety (less than 60 percent in the unit reporting a good teamwork or safety climate).
* Staff unfamiliar with responsibilities and practice domains of another profession.

**How to use this tool:** Review this tool before your shadowing experience to help you recognize teamwork and communication issues among practice domains that are important in patient care delivery. Use this document to identify problems observed in patient care areas within the practice setting of the individual you are shadowing. Spend 4 hours within another practice domain. Follow your health care clinician through his or her daily activities and again at the end of the day:

1. Review your list of observed communication and teamwork problems. Be objective and use a systems approach to look at patient care delivery.

2. Discuss with the clinician you shadowed what you believe may reduce communication errors and teamwork problems affecting patient care delivery within your practice domain.

3. Prepare a draft of the problems identified and your proposed solutions. Meet with the administration to discuss your findings.

Shadowing

**1. What happened during the shadowing exercise that involved multiple practice domains?** (Outline your observations. For this experience, put yourself in the place of the other clinician and try to view the world as he or she does.)

**2. Put the pieces together.** Below is a framework to help you identify communication and teamwork issues that affect patient care and the teamwork climate in the unit. Please read and answer the following questions.

|  | Yes | No | N/A |
| --- | --- | --- | --- |
| **1. Were any health care clinicians difficult to approach?** |  |  |  |
| How did that affect the effectiveness of the health care clinician you shadowed (e.g., order ignored)? |  |  |  |
| What was the final outcome for the patient (e.g., delay in care)? |  |  |  |
| Did this unapproachable clinician detract from the teamwork climate in the unit? |  |  |  |
| Did the clinician you shadowed seem comfortable working with this difficult clinician? |  |  |  |
| **2. Was one clinician approached more often for patient issues?** |  |  |  |
| If yes, was it because another health care clinician was difficult to work with? |  |  |  |
| If one clinician was approached more often, what patient care issues evolved (e.g., delay in care delivery, provider overwhelmed)? |  |  |  |
| **3. Did you observe any errors in transcription of orders by the clinician you shadowed?** |  |  |  |
| **4. Did you observe any error in the interpretation or delivery of an order?** |  |  |  |
| **5. Were patient problems identified quickly?** |  |  |  |
| Were they handled as you would have dealt with them?  Why or why not? |  |  |  |
| Were there obstacles that prevented effective handling of the situation (e.g., lack of staff, equipment)? |  |  |  |
| Did the clinicians involved seek help from a supervisor or peer? |  |  |  |
| **6. If you shadowed a nurse:** |  |  |  |
| Was the nurse’s page or phone call returned quickly when there was an important issue?  If yes, what was the outcome for the patient? |  |  |  |
| Were patient medications available to the nurse when they were due?  If no, what was the average wait time?  How did the nurse react if the medication was late (e.g., anxious, angry, upset)? |  |  |  |
| If the medications were delayed, could this affect the patient’s outcome (e.g., delay in discharge to home)? |  |  |  |
| **7. If you shadowed a physician:** |  |  |  |
| Did the physician face obstacles in returning calls or pages?  If yes, what were the obstacles? |  |  |  |
| Did other factors affect the physician’s ability to see patients?  If yes, what were they? |  |  |  |
| Did the physician receive clear information or instructions? |  |  |  |
| **8. If you shadowed a pharmacist:** |  |  |  |
| Did the pharmacist face obstacles in dispensing on time?  If yes, what were the obstacles? |  |  |  |
| **9. How would you assess—** |  |  |  |
| **Handoffs:** During the handoff, were verbal or written communications clear, accurate, clinically relevant, and goal directed? (That is, did the outgoing care team debrief the oncoming care team regarding the patient’s condition?) If no, explain why. |  |  |  |
| **Communication during a crisis*:*** During a crisis, were verbal or written communications clear, accurate, clinically relevant, and goal directed? *(*That is, did the team leader quickly explain and direct the team regarding the plan of action?) If no, explain why. |  |  |  |
| **Clinician skill**: Did the clinician you shadowed seem skilled at all procedures he or she performed?  If no, did he or she seek out a supervisor or peer for assistance? |  |  |  |
| **Staffing:** Did staffing affect care delivery? If yes, explain why. |  |  |  |

**3. Now that you have shadowed a person in another profession, what will you do differently in your clinical practice to communicate more effectively?**

**4. What suggestions do you have for improving teamwork and communication?**

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| Specific Recommendations | Actions Taken |
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