# PEARLS for System Integration (PSI) Healthcare Debriefing Tool

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<tr>
<th><strong>Objective</strong></th>
<th><strong>Task</strong></th>
<th><strong>Sample Phrases</strong></th>
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<tr>
<td><strong>Pre-Work</strong></td>
<td>Develop sample pre-determined stakeholder objectives.</td>
<td>Work with stakeholders to identify and prioritize potential high-impact and high-risk changes and develop pre-determined objectives.</td>
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<tr>
<td><strong>Description</strong></td>
<td>Create a shared mental model by reiterating the focus of simulation and providing a summary of events / key medical issues.</td>
<td>Re-orient to shared understanding of simulation objectives and address any specific medical questions.</td>
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<td><strong>Reactions (Optional)</strong></td>
<td>Used to explore feelings about process/system being evaluated. Helpful for small groups and strong reactions (positive or negative).</td>
<td>Keep focus on system objectives, quickly follow up exploring reactions with exploring system objectives.</td>
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<tr>
<td><strong>Analysis</strong></td>
<td>Explore variety of performance domains.</td>
<td>See backside of card for more details.</td>
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<tr>
<td><strong>Summary</strong></td>
<td>Identify system issues; potential solutions/ideas and next steps.</td>
<td>Provide summary to close the debrief and identify next steps.</td>
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**Transition Statement**
(Use to introduce next pre-determined learning objective)
“Let’s talk about X, as that was an area of potential concern.”

**Exploring Each Stakeholder Objective**
(Use to summarize discussion of one topic)
“We identified some areas for improvement. Any other observations related to X before we move on?”

**Sample Phrases**
What do you perceive to be the highest risk changes associated with this new space/process?
What are you most worried about with the implementation of X?
“We are going to spend the next X minutes debriefing that simulation. This simulation is not about your individual knowledge or skills. The focus is to improve the systems and processes in which we work and identify system issues, including latent system threats. In this scenario [provide quick summary of scenario].”
“How did you feel about working in this new unit / with this new process?” Quickly follow with “What about this new unit / process contributed to you feeling that way?”

“Let’s talk about X, as that was an area of potential concern.”
“We identified some areas for improvement. Any other observations related to X before we move on?”

“The biggest learnings / opportunities from today’s simulation are X, Y, Z”…. (Summarize key learnings, action items, operational owners when time permits)
“Are there any other potential changes we should capture?”

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The analysis phase is used to uncover system issues in a variety of pre-determined objectives. Below are several sample categories:

**System Issues Categories**

- Tools and Technology
- Tasks
- Environment
- People
- Organization
- Processes

**Primary Strategy**

**Participant System Assessment <Plus Delta (+/Δ)>**

Work through each pre-determined stakeholder objective and identify what did and what didn’t go well.

**Secondary Strategies (if needed)**

**Directive Feedback**

Respond to specific questions as needed.

**Focused Facilitation (i.e., Advocacy Inquiry)**

Can be used to probe deeper to understand underlying systems issues, especially if participants are not self-identifying improvement opportunities.

**Sample Phrases**

- **“What aspects of your communication system did/did not work well, why?”**
- **“What issues did you experience with the new piece of equipment?”**
- **“How did this new process affect your situational awareness?”**
- **“What worked well/did not work well with route X versus Y?”**
- **“How did the design of this communication pathway impact your patient care?”**
- **“What would have made your communication more effective/efficient?”**
- **“I heard a question about why we have to call "X" at this point in the process. That is because no one covers the phone after 8 PM.”**
- **“I heard concerns about the location of the beam blocking line of sight. Unfortunately, that is an unmovable support beam.”**
- **Advocacy: “I noticed X. That is concerning because it could potentially lead to patient harm.”**
- **Inquiry: “What made that more challenging for you? What would make that more effective/efficient?”**