THE AMERICAN PILOTS' ASSOCIATION

**The Master-Pilot Information Exchange:
A Best Practices Summary**[*]

1. Master-Pilot Conference
 • Each pilotage assignment should begin with a conference between the pilot and the master.
 • The initial conference is an opportunity not only to exchange information that the pilot and master each needs, but also for the pilot and the master to establish an appropriate working relationship.
 • The conference should convey, and be consistent with, the principle that the pilot and the master/bridge crew each has an important role in the navigation of the vessel.
 • The amount and subject matter of the information to be exchanged in the initial conference should be determined by the specific navigation demands of the pilotage operation.
 • For some vessel movements, particularly those involving a long run or difficult maneuvers at the beginning of the movement, not all relevant information must, or should, be exchanged in the initial conference; additional information can be exchanged as the movement proceeds.

2. Pilot's Information Card ("MPX Card")
 • Pilot groups should consider developing information cards (MPX Cards) for use by their members.
 • The pilot should give the card to the master at the time of the initial conference and use it as the basis for discussion during the conference.
 • The card should supplement, not substitute for, the master-pilot information exchange.
 • There should be a separate card for outbound and inbound movements, also for shifting operations or different pilotage areas, if appropriate.
 • The card should include information or instructions specific to navigation in the local pilotage area; subjects that might be addressed include:
   • radio channels to be monitored;
   • posting of anchor watch/lookout (beyond the requirements
    of the Rules of the Road); and
   • local navigation requirements or restrictions (tug escorts,
    speed limits, one-way traffic areas, etc.).

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[*] Adopted by the Board of Trustees of the American Pilots' Association on October 8, 1997.

•   The card should also include instructions or requests concerning what the pilot needs from the master and crew; subjects that might be addressed include:
> • information about the vessel, its characteristics and condition;
> • crew to fix position of vessel; and
> • only English to be spoken on bridge.

•   The card should have a blank space for the pilot to add own items.

•   Cards should be available to agents for transmission to vessels.

•   The pilot group should consider having the pilot commission or other oversight authority approve card; the group should advise the Coast Guard of its practice.

3. Pilot's Individual Exchange Practice

•   Each pilot should develop a personal, standardized conference practice, taking into account regulatory requirements and best practices in pilotage area.

•   Pilots should consider using memory aids, such as written or mental checklists, to ensure that essential exchange items are covered.

4. Absent/Unwilling/Incapable Master

•   An effective exchange requires the participation of a master who is present, is willing, and has sufficient skills, knowledge, and English language proficiency to provide the information needed by the pilot and to understand the pilot's instructions and requests.

•   Pilots should be aware of regulatory requirements for masters to provide specific information to the pilot and to cooperate closely with the pilot.

•   The pilot should make all reasonable efforts to obtain the presence of the master for purposes of conducting a conference.

•   If the master or bridge crew fails to provide the information needed by the pilot or if an unsatisfactory exchange leads the pilot to doubt the ability of the master or bridge crew to perform the navigation duties normally expected during the vessel movement, the pilot should use his or her best professional judgment to determine whether it is safe to proceed with the movement.

•   If a pilot determines that a movement can safely proceed despite an unsatisfactory exchange, the pilot should adjust his or her pilotage practices during the movement accordingly and should report or record the master's refusal to engage in an exchange or to provide required information.

•   If a pilot determines that it is not safe to proceed with a vessel movement due to an unsatisfactory exchange, the pilot should refuse to proceed, advise the master/bridge crew on anchoring the vessel or taking other steps to secure the vessel's safety, and notify appropriate authorities by the best means available.

5. Ship's Pilot Card/Wheelhouse Poster

• Pilots should be aware of regulations requiring vessels to have a pilot card and wheelhouse poster containing maneuvering data and other information concerning the ship.

• If the pilot, in the exercise of his or her best judgment, considers the information provided orally by the master about the vessel and its characteristics unclear or insufficient, the pilot should consult the pilot card/wheelhouse poster to confirm or supplement the information from the master.

• Pilots should be aware that information on a pilot card/wheelhouse poster about a vessel's maneuvering and handling characteristics may not be accurate when maneuvering in the particular waters of the pilot's area or under local conditions that may be present during the pilotage operation and that such information may be based on "new vessel" conditions, which may be affected by factors such as bottom fouling, propeller/rudder damage, or trim.

6. Ships Calling on a Frequent, Regular Basis

• The information exchange should not be abandoned for vessels that call on a frequent, regular basis; such vessels have the potential to induce complacency.

• The exchange for such vessels can, and should, be adjusted, however, with the focus on items, concerning both vessel and pilotage, that may have changed since the previous call or are otherwise pertinent to the particular pilotage operation.

7. Continuing Communication

• The initial conference should not be the end of communication and information sharing.

• The pilot should convey during the initial conference: the need to communicate throughout the pilotage operation, the pilot's willingness to answer questions, and the pilot's continuing need for information.

8. Pilot-to-Pilot Transfer

• The transferor pilot should request the master's presence during transfer.

• Recognizing that the circumstances of many pilot-to-pilot transfers do not allow sufficient time for extensive discussion among the two pilots and the master, pilots should develop techniques for quickly exchanging the most critical information in the time available.

• Where practical, the transferor pilot should give the present status of the vessel to the transferee pilot, as well as any unusual or problematic handling or operational characteristics of the vessel.

• Where practical, the transferor pilot should repeat to the transferee pilot information previously given by the master, in the master's presence, and ask the master to confirm that the information is correct.

9. Pilot Boarding Locations and Procedures

•   In places where the pilot boarding location or procedures impose significant constraints on the time or attention that can be devoted to the initial master-pilot conference, pilot groups and regulatory authorities should review whether changing the boarding location and/or the procedures would be feasible and would produce significant benefits that could not be obtained through improvements in the conference process.

•   Any proposed change in the pilot boarding location or procedures should be measured against the traditional principle that pilot boarding locations and procedures are determined by both the navigational needs of the ship and the personal safety of the pilot.

10. Training in the Master-Pilot Information Exchange

•   The master-pilot information exchange should be an important focus of initial and continuing training for pilots, particularly Bridge Resource Management courses for pilots.

•   Initial training in the master-pilot information exchange should cover:
  • regulatory requirements;
  • recognition of language, cultural, psychological and physiological impediments to effective communication and interaction and techniques for overcoming those impediments; and
  • best practices in specific pilotage area.

•   Continuing training in the master-pilot information exchange should review initial training items and examine recent accidents, new practices of other pilots, and studies dealing with the subject.