# 

**[Company name]**

**Safe Patient Handling and Mobility Plan**

**[Facility address and phone]**

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**Table of Contents**

Policy Statement 1

Responsibility 2

Plan Administration 2

Definitions 4

Compliance 4

Procedures 5

Supporting Materials 6

Approvals 6

Attachment [*number*]— Patient Risk Assessment for Safe Handling and Movement

Attachment [*number*]— Patient Care Incident Log

Attachment [*number*]— Safe Patient Handling Program Checklist

Attachment [*number*]— Sample Safe Patient Handling Training Log

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# Policy Statement

(**Organization name**) is committed to promoting a safe environment for patients, visitors and employees. This policy applies to all employees who handle patients who require total or partial moving or transfer assistance. The Safe Patient Handling and Mobility Plan (SPHMP) at **(organization name)** uses proven methods and the latest specialized devices and equipment to eliminate manual lifting whenever possible to keep patients and staff safe when patients are moved and lifted.

All healthcare employees who handle and move patients will be aware of and trained on the correct procedures for lifting and moving patients to reduce incidents of musculoskeletal injuries while encouraging patient mobility and independence. Employees will not perform patient transfers/complex lifts without mechanical assistive devices, except in an emergency.

# Responsibility

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, delegate the responsibility for the administration of this organization’s SPHMP to **[*SPHMP administrator OR the managers and supervisors who are in charge of employees in their respective work areas*].** Responsibilities for protecting the safety and health of all employees are assigned according to the *Plan Administration* section of this SPHMP.

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**[Owner or Chief Executive Officer] Date**

# Plan Administration

**[*Modify the list of job titles and contact information as applicable; describe their responsibilities below the table*.]**

|  |  |  |
| --- | --- | --- |
| **Function** | **Name/Department** | **Contact Information** |
| Nursing Director |  | Work phone:  Cell phone: |
| Nursing Manager |  | Work phone:  Cell phone: |
| SPHMP Champion (unit based) |  | Work phone:  Cell phone: |
| SPHMP Facilitator |  | Work phone:  Cell phone: |
| Facility Management |  | Work phone:  Cell phone: |
|  |  | Work phone:  Cell phone: |

**Nursing Director.** The Nursing Director will support the culture of safety within the organization, and the implementation of this policy and the SPHMP. He or she will:

* Provide sufficient patient handling equipment and aids to ensure safe patient handling and movement.
* Make sure that patient handling equipment and aids are well maintained and, when necessary, repaired in a timely manner.
* Ensure staffing levels are appropriate to support safe patient handling and movement.

**Nursing Manager.** The Nursing Manager will support a culture of safety and the implementation of this policy and the SPHMP. He or she will:

* Ensure high-risk patient handling tasks are assessed prior to completion and the tasks are completed safely through the use of mechanical lifting devices and other approved patient handling aids and appropriate techniques.
* Make sure patient handling equipment and other equipment/aids are available, maintained in proper working order, and are stored conveniently and safely.
* Ensure that employees complete initial and annual safe patient handling awareness training and undergo retraining if they show non-compliance with safe patient handling and movement or equipment use.
* Maintain training records.
* Report all known staff injuries resulting from patient handling tasks to Employee Health within 24 hours.
* Monitor for injuries that occur due to the handling and movement of patients within units. Develop an action plan to reeducate staff on the use of equipment if there appears to be an increase in injuries.
* Maintain accident reports and supplemental injury statistics.

**Unit-based SPHMP Champion.** The unit-based SPHMP Champion will assist coworkers, staff from other units, new employees and student nurses with the following activities:

* Train unit staff in the safe use of patient handling equipment and processes.
* Assess patient dependency at admission, shift change, or during the shift.
* Conduct a patient mobility assessment.
* Use the patient white board for safe patient handling communications.
* Identify equipment storage locations.
* Track equipment on units/departments.
* Ensure batteries are charged and ready for use.
* Troubleshoot problems with basic equipment and contacting maintenance.
* Help collect data on patient satisfaction and lift usage.
* Identify barriers to using equipment.
* Assist supervisors with any accident or incident investigations as required.

**SPHMP Facilitator.** The SPHMP facilitator will implement, evaluate, and maintain the organization’s SPHMP. He or she will also:

* Help facilitate/provide training to designated SPHMP champions and staff.
* Communicate with healthcare administration and management about the status of the program.
* Lead incident/accident investigations and make recommendations as necessary.
* Analyze injury statistics each quarter and make recommendations as necessary.

**Facility management:** Facility management will inspect patient handling equipment each month to ensure it is in proper working order**.** They will also:

* Consult with equipment manufacturers and representatives to ensure the safe installation of equipment.
* Establish procedures to remove damaged equipment from service.

# Definitions

**High-risk patient handling tasks:** Activities that have a high risk of musculoskeletal injury for staff who perform the tasks. These injuries are due in large part to overexertion related to repeated manual patient handling activities, often involving heavy manual lifting associated with transferring, and repositioning patients, and working in extremely awkward postures. Examples include, but are not limited to, transferring a patient from toilet to chair, transferring from chair to bed, transferring from bathtub to chair, repositioning from side to side in bed, lifting a patient in bed, repositioning a patient in chair, making a bed with a patient in it, dressing patients, and standing for long periods of time.

**Musculoskeletal injuries:** Injuries or disorders of the muscles, nerves, tendons, joints, cartilage, and spinal discs. These injuries are caused by a combination of risk factors, such as repeated awkward and sustained postures and forceful exertion. Work-related musculoskeletal injuries are associated with high costs to employers such as absenteeism, lost productivity, and increased healthcare, disability, and worker’s compensation costs. Musculoskeletal disorders are more severe than the average nonfatal injury or illness.

**Manual lifting:** The act of moving, lifting, transferring, or repositioning a patient using the caregiver’s body strength, without the use of lifting equipment/handling aids or devices which reduce forces on the caregiver’s musculoskeletal structure.

**Safe patient handling equipment:** Mechanical equipment and resources used to lift, transfer, and reposition patients so that healthcare workers can avoid manual exertions and reduce their risk of musculoskeletal injuries. The equipment includes, but is not limited to, powered height-adjustable exam tables, ceiling-mounted and portable/floor-based lifts; powered stand assist lifts; stretchers, equipment/bed/wheelchair transport assistive devices, stand-assist aides, sliding boards, and surface-friction reducing devices.

**Safe patient handling dependency assessment:** An assessment of the patient’s characteristics to determine the safest equipment, techniques, and number of staff needed to complete patient handling and mobility tasks.

**Safe patient mobility assessment:** An assessment of the ability of a patient to successfully ambulate short distances, such as from bed to chair, wheelchair to/from exam table, or chair to chair or commode.

# Compliance

Employees have a duty to take reasonable care of their own health and safety, as well as that of their co-workers and patients during all patient handling activities, using proper body mechanics, transfer techniques, and seek additional help as needed/required. Employees will use mechanical lifting devices to pivot, transfer, or lift patients who are assessed as needing assistance. Noncompliance will indicate a need for retraining. Repeated noncompliance with this policy will result in corrective action, up to and including termination.

Caregivers who, due to concerns about patient or worker safety or the lack of trained personnel or applicable equipment, refuse to lift, reposition, or transfer a patient will not receive disciplinary action by (organization name) or any of its managers or employees.

# Procedures

1. **Safe Patient Handling and Movement Requirements:**
   1. Employees will follow safe patient handling techniques and use all approved patient handling equipment and aids for all patient handling activities except when absolutely necessary, such as a medical emergency.
   2. Patient handling activities include, but are not limited to, repositioning in bed, bed to chair/wheelchair, bed to gurney, gurney to treatment table, bed to toilet, floor to bed, or a lift that requires total body movement of a non-ambulatory patient.
2. **Training**
   1. All healthcare employees who handle and move patients will receive training from staff with expertise in safe patient handling and movement on the proper use of patient handling equipment. All training will be documented.
   2. Training content is tailored for the specific venue and audience and can include, but is not limited to the following topics:
      1. The importance of using safe patient handling practices
      2. Ergonomics
      3. Patient assessment
      4. Lift equipment demonstrations
      5. Hands-on practice with the lift equipment
   3. Unit-specific training will be provided to all employees whose work assignments include being present on patient care units that effectively address the activities they are reasonably anticipated to perform under this plan.
      1. Initial training will be provided when the plan is first established, to all new employees, and to all employees given new job assignments for which training has not previously been received;
      2. Refresher training will be provided annually to employees in patient care areas and their supervisors.
      3. Additional training will be provided on the unit when new equipment or work practices are introduced.
3. **Assessment of Patients’ Safe Handling Needs**
   1. Patients will be assessed by an RN to determine their dependency status and mobility needs. The assessments will be documented in the patient medical record.
   2. Safe patient handling needs will be indicated in the patient’s chart and noted on a white board or chart in the patient’s room.
4. **Equipment**
   1. All healthcare employees who handle and move patients must use patient handling equipment and other approved patient handling aids according to training and instructions.
   2. Patient handling equipment will be accessible and stored conveniently and safety.
   3. Patient handling equipment will be maintained and kept in proper working order.
5. **Reporting of Injuries or Incidents**
   1. Nursing staff will report all incidents/injuries resulting from patient handling and movement.
   2. Supervisors will report patient handling injury information as required by the organization.

# Supporting Materials

**[*Samples of the attachments are available at safety.blr.com*. *Find the associated materials displayed under this document on Safety.BLR.com.*]**

Attachment [*number*]— Patient Risk Assessment for Safe Handling and Movement

Attachment [*number*]— Patient Care Incident Log

Attachment [*number*]— Safe Patient Handling Program Checklist

Attachment [*number*]— Sample Safe Patient Handling Training Log

# Approvals

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| --- | --- | --- | --- | --- |
| Reviewed by: |  |  | Date: |  |
| Approved by: |  |  | Date: |  |