

Appendix H – Guideline for Minimal Lift (Client Handling) Policy and Procedure Development

Organization name

Departmental policy identifier: (Indicate which department is responsible for this policy and any numeric identifier that is used)

Subject: Minimal Lift Policy (Client Handling Policy)

Date approved:

Approved by: (Senior management)

Date reviewed:

Commitment Statement

This organization is committed to providing a safe and healthy working environment for all staff and clients. Our organization will demonstrate its commitment by providing financial, physical and human resources to ensure that mechanical lifts are used for the lifting of the total body weight of the client, lateral slide procedures and devices are used to move non-weight-bearing clients horizontally from one surface to another, and that assistive devices are used where appropriate for client transfers and repositioning.

This policy applies to day-to-day client handling activities. Unique client needs, unusual occurrences or emergencies will be addressed in other policies (e.g., emergency response) or by the management team. The organization is committed to annually reviewing and evaluating the program in consultation with the JHSC and stakeholders.

Goals

- Decrease the physical demands of client handling tasks
- Decrease the risk of musculoskeletal disorders associated with client handling tasks
- Promote and support the health and safety of all clients and employees
- Provide equipment, resources and effective training

Objectives (ensure objectives are measurable)

- Promote and ensure the consistent application of safe client lift, transfer and repositioning techniques
- Ensure all clients are assessed for their mobility status
- Ensure all caregivers continually review all risk factors related to client mobility
- Promote the use of mechanical client lift devices and transfer aids
- Ensure caregivers have the appropriate training and skills with respect to client mobility assessment, client handling techniques and use of all available assistive or mechanical devices

Definitions

Lift: A procedure used to support and carry the entire weight of a person from one surface to another. A lift is used to move a client who is physically unable to weight-bear through his/her arms or legs, and/or is mentally unable to co-operate in the procedure. A lift may be accomplished manually by at least two caregivers or mechanically using a lifting device.

Lateral Slide (or Transfer): A procedure used to move a reclined client from one flat surface horizontally to another flat surface. The client is unable to weight-bear through their arms or legs and/or is mentally unable to co-operate with the procedure. The client may not be able and/or permitted to sit or use a mechanical lifting device. Friction-reducing sliding devices such as slider sheets, slider boards, air mattress technologies, mechanized or powered platform devices should be used when appropriate.

Note: This procedure is sometimes referred to as a lateral transfer. However, by definition, the term “transfer” implies that the client is weight-bearing and this is typically a non-weight-bearing procedure. The term lateral slide is preferred.

Transfer: A procedure used to assist a client to move from one surface to another. The client must be able to weight-bear through at least one leg or both arms, and mentally able to co-operate and follow instructions. Assistive devices, such as a transfer belt, transfer board, transfer disk or sit-stand equipment should be used when appropriate.

Repositioning: A procedure used to move a client to a new position on the same surface such as up in bed or in a chair. The client may or may not assist in the procedure. Friction-reducing devices such as repositioning sheets should be used when appropriate.

Manual Handling: The lifting, transferring or repositioning of a client without the use of a mechanical lift, transfer belt or other assistive device.

Roles and Responsibilities of Workplace Parties

All workplace parties are required to comply with the outlined policy and procedures.

Employer

- Enforce the policy, procedures and program
- Ensure a training program is established, developed and provided in consultation with the JHSC
- Provide equipment, necessary resources and initial and ongoing staff training
- Maintain the Safe Handling of Clients Program through Continuous Quality Improvement
- Evaluate and update the program at least annually
- Take every precaution reasonable in the circumstances for the protection of workers

Supervisors

- Enforce program through regular monitoring strategies
- Conduct accident/incident investigations
- Report all findings of investigations senior management
- Ensure all staff are trained in the use of client handling equipment
- Maintain training records
- Ensure all new staff receive general and site-specific orientation to the policy and program
- Maintain equipment assigned to their department
- Conduct pre-start-up inspections of equipment
- Include the auditing of worker practice in the planned inspections and report on findings to senior management
- Ensure that all new clients have a mobility assessment within 24 hours of admission and determine lift/transfer/repositioning technique and equipment
- Ensure appropriate technique is communicated in client's care plan
- Take every reasonable precaution for the protection of the worker and client

Workers

- Comply with policy and procedures at all times
- Participate in regular training as established by the organization
- Adhere to the designated lift/transfer status as identified on each client's care plan

- Report any unsafe acts, hazards, equipment problems, change in client mobility status or any other untoward issue immediately to the supervisor or delegate
- Report any incidents, accidents and near misses to the supervisor immediately and co-operate in the investigation as required by management

Joint Health and Safety Committee

- Review incident/accident data related to client handling
- Inspect client handling activities as part of the monthly workplace inspection process
- Review policy and program annually
- Make recommendations in writing to management

Procedures

Client Assessments

- Upon admission or within 24 hours, the Team Leader or the assigned nurse completes and documents her assessment using the Client Mobility Assessment form
- Each client must have a completed Client Mobility Assessment form on their chart
- A client-handling technique will be identified for each client on their plan of care
- The assigned caregiver can carry out client handling techniques that are different from those identified on the care plan only if it entails upgrading the amount of assistance; this must be immediately followed by a request for an updated assessment
- Any downgrading or upgrading of assistance can only be approved after a formal client mobility assessment
- The Client Mobility Assessment will be reviewed and updated as required

Communication

- Staff completing client assessments will communicate the details of the assessment in the client profile/care plan – include the selected client handling technique, the amount of staff assistance required, the equipment and devices required and any other pertinent information
- Areas where a client handling logo system is approved may use logo cards depicting the appropriate client handling technique
- Where appropriate, staff will communicate client handling findings verbally to other caregivers (e.g., during shift change or client rounds)

Client Handling techniques and Equipment

- Staff performing client handling must be trained and are required to follow the standard procedures outlined by the facility for client transfer, lateral slide, lift and repositioning or other procedures to ensure safe and consistent performance of client handling techniques (see Modules 5 and 6)
- Staff using client handling equipment must be trained and are required to use the equipment as outlined in standard operating procedures and the manufacturers' guidelines

Training

- Mandatory orientation training will be provided to all new staff required to perform client handling activities – include musculoskeletal disorder awareness and prevention, written policy and procedures and compliance expectations, client handling assessment, communication and documentation, practical training in accepted client handling techniques and the use of equipment and devices
- Staff will also be trained in site specific-client issues and equipment
- Mandatory ongoing review training will be provided to all staff at least annually
- Records of training will be documented and maintained by Human Resources, with copies to each manager

Pre-use Inspection of Equipment by Staff

- A designated shift is responsible to change the batteries on a daily basis and place in battery charger
- Any unsafe equipment and/or sling shall be removed from service and labelled immediately, and a maintenance request form forwarded to the maintenance department
- Nursing staff is responsible for inspecting the slings and reporting wear and tear to the charge nurse; a form should be completed and forwarded to the designated authority
- A designated shift is responsible for assessing the inventory of slings on the unit
- All staff are responsible for ensuring that the mechanical lift equipment is in proper working condition and addressing any concerns to the designated authority
- Equipment is to be checked at each shift and the checklist log maintained

Preventive Maintenance of Equipment

- Environmental Services will oversee the equipment preventive maintenance program
- All equipment will be maintained in safe operating condition
- Orders for and completion of preventive maintenance programs on all mechanical client lift equipment will be carried out as recommended by the manufacturers

- Complete and accurate documentation of preventive maintenance will be maintained as per preventive maintenance policy and procedure

Infection Control, Cleaning, Disinfection and Laundering

- Housekeeping is responsible for cleaning and disinfecting the mechanical lifts and devices on a daily basis – also refer to manufacturers' guidelines
- All slings shall be laundered as per manufacturers' guidelines and the schedule established by infection control
- Any soiled slings shall be removed from service until laundered
- Client handling lifts and devices being used in rooms identified with isolation precautions must be disinfected by housekeeping as per facility policy and procedure prior to removing the equipment from the room

Reporting and Investigation Hazards, Accident and Incidents

- All staff are required to report client handling hazards, accidents and incidents promptly to their supervisor for follow-up investigation to determine root cause of the event and implementation of appropriate corrective actions
- The hazard, accident or incident will be reported on the appropriate reporting and investigation forms
- Supervisors will ensure that the reports and investigation documents are completed within the required reporting timelines and submitted to the administrator
- Summary of client handling hazards, accidents and incidents is to be reviewed by the client handling committee and JHSC
- Employer will ensure compliance with reporting requirements outlined in Sections 51-53 of the Occupational Health and Safety Act and associated regulation(s)

Purchasing of Equipment and Devices

- Purchasing Services will oversee the purchase of client handling equipment and devices, once the purchase has been approved by management
- The type of equipment to be purchased will be based on the client handling program needs assessment and re-assessment
- Purchasing will consult vendors and suppliers and arrange unit-specific trials with end-users
- Equipment will be evaluated based on pre-established criteria developed by the client handling committee (meets required standards, maintenance requirements, ease of use, storage requirements, cost, vendor training, safe features, staff feedback, etc.)

- See corporate policy and procedures regarding the processes for approval to purchase minor equipment and capital budget requests

Program Evaluation and Quality Improvement

The Safe Handling of Clients program will be evaluated annually, in consultation with the JHSC and more frequently than annually on the advice of the JHSC or if there is a change in circumstance that may affect the health and safety of a worker as per the HCRFR, s. 9(2)-(4). Senior management will approve the program revisions. The following qualitative and quantitative program indicators will be collected in a timely manner by the designated authority and forwarded to the program leader, who will collate, analyze and summarize the data and make recommendations for program enhancements to senior management:

- Employee incidents/accidents
- Accident investigations
- Near misses/hazards
- Equipment inspections
- Planned monthly inspections – auditing of worker practice, etc.

Any changes to the program will be documented and communicated immediately to all affected staff and management. The designated authority will implement any changes within their area and will keep the program leader informed.