

Patient Assessment, Care Planning & Algorithms for Safe Patient Handling and Movement

Purpose of Patient Assessment Criteria

The following patient assessment criteria will assist health care staff in considering critical patient characteristics that affect decisions for selecting the safest equipment and techniques for patient handling and movement tasks. Health care staff members have become accustomed to using whatever limited lifting aids are available, rather than carefully matching equipment to specific patient characteristics. It is expected that careful use of this assessment and planning tool will improve safety for both patients and caregivers. Patients will receive assistance appropriate for their functional level, assuring safety and comfort. For caregivers, the goals are to decrease the incidence, severity, and costs associated with job-related injuries, as well as decreasing the intensity, duration, and frequency of job-related musculoskeletal pain and discomfort.

Background

A Technical Advisory Group (TAG), working in collaboration with the Public Health and Environmental Hazards, Patient Safety Center of Inquiry in Tampa, FL, and Healthcare Analysis and Information Group, was formed. The TAG developed an algorithm for each of the key transfer and repositioning tasks. The algorithms were tested with different patient populations in a variety of clinical settings. The algorithms are designed to assist health care employees in selecting the safest equipment and techniques based on specific patient characteristics. These guidelines were prepared based on scientific and professional information available in March 2001. Users of this guideline should periodically review this material to ensure the advice herein is consistent with current reasonable clinical practice. As with any guideline, this content provides general direction; professional judgment is needed to assure safety of patients and caregivers. **(For a form that can be used in patient care areas for assessing patients, see p. 3.)**

Key Points for Caregivers

- ✓ Assess the patient.
- ✓ Assess the area.
- ✓ Decide on equipment.
- ✓ Know how to use equipment.
- ✓ Plan lift and communicate with staff and patient.
- ✓ Work together, including actions of more than one caregiver as well as the patient.
- ✓ Have the right equipment available, in good working order, and conveniently located.

Key Assessment Criteria

- ✓ Ability of the patient to provide assistance.
- ✓ Ability of the patient to bear weight.
- ✓ Upper-extremity strength of the patient.
- ✓ Ability of the patient to cooperate and follow instructions.
- ✓ Patient height and weight.
- ✓ Special circumstances likely to affect transfer or repositioning tasks, such as abdominal wounds, contractures, or presence of tubes, etc.
- ✓ Specific physician orders or physical therapy recommendations that relate to transferring or repositioning patients. (For example, a patient with a knee or hip replacement may need a specific order or recommendation to maintain the correct angle of hip or knee flexion during transfer.)

Care Plan Considerations

- ✓ Type of task to be completed, e.g., transferring, repositioning, ambulating, or toileting.
- ✓ Type of equipment or assistive devices needed.
- ✓ Number of caregivers needed to complete the task safely.

Process for Using Assessment and Planning Criteria

The specific process for assessment and care planning may vary by facility, patient population, or level of care. However, key elements need to be considered and integrated into the assessment and care planning process for safe patient handling and movement:

- ✓ Who completes the assessment?
- ✓ How often assessment is completed.
- ✓ Communication plan.
- ✓ Updating/revising the plan as needed.

Purpose of Algorithms

This provides assessment criteria to assist health care staff in the planning for safe handling and movement of each patient. Algorithms should be used as guides when planning patient transfers and repositioning tasks. The algorithms are targeted for people directly involved with patient handling and movement, such as registered nurses, licensed practical nurses, nursing assistants, orderlies, physical/occupational therapists, radiology technicians, and patient care technicians. **(For a sample algorithm, see p. 4.)**

Background

The algorithms are designed to assist health care employees in selecting the safest equipment and techniques based on specific patient characteristics. These guidelines were prepared based on scientific and professional information available in March 2001. Users of this guideline should periodically review this material to ensure the advice herein is consistent with current reasonable clinical practice. As with any guideline, this content provides general direction; professional judgment is needed to assure safety of patients and caregivers.

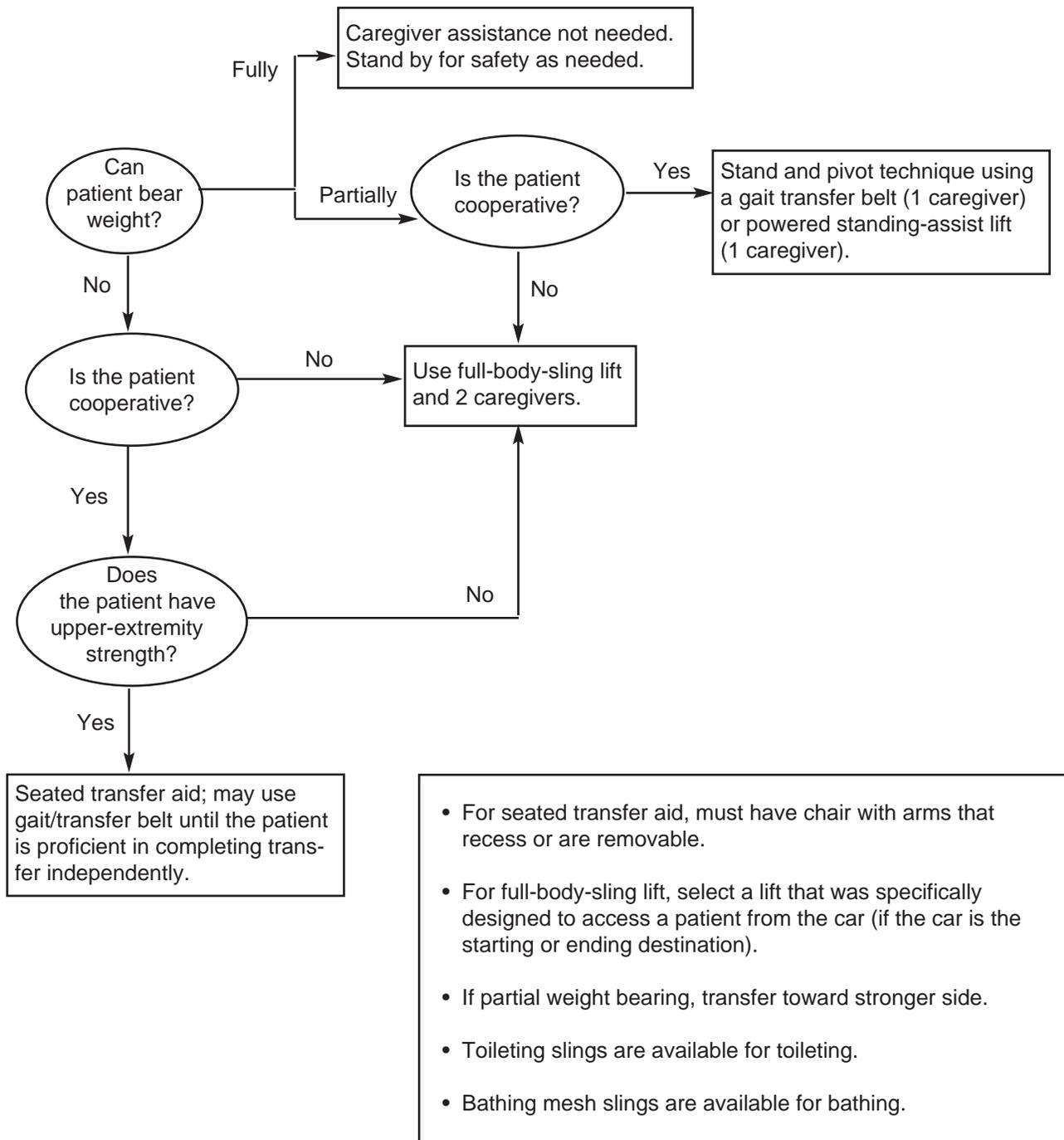
These algorithms were tested with different patient populations in six clinical areas:

1. intensive care units;
2. acute care units;
3. nursing home care units;
4. outpatient areas and clinics and emergency departments;
5. operating and recovery rooms;
6. spinal cord injury units and rehabilitation units.

The algorithms were reviewed and approved for use by Veterans Health Administration (VHA) nurse executives.

To see additional algorithms, go to VHA's web site: www.patientsafetycenter.com/products.htm.

Algorithm 1. Transfer to and from: Bed to Chair, Chair to Toilet, Chair to Chair, or Car to Chair



- For seated transfer aid, must have chair with arms that recess or are removable.
- For full-body-sling lift, select a lift that was specifically designed to access a patient from the car (if the car is the starting or ending destination).
- If partial weight bearing, transfer toward stronger side.
- Toileting slings are available for toileting.
- Bathing mesh slings are available for bathing.

Source: Veterans Health Administration, Washington, DC. Web site: www.patientsafetycenter.com/products.htm.