

# Safe Handling Program Checklist

I. Policy Development	Completed	In Progress	N/A
<p><b>A. Does the workplace have a safe handling policy including: employer’s commitment to safe handling, eliminating manual lifting; defining handling; roles, responsibilities and expectations</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:			
<p><b>B. How do you measure effectiveness of the policy?</b></p>			
<p><i>It is important to have a policy in place that is understood by all staff, clients and family members and reviewed on a regular basis. Systematic clarification of the roles and responsibilities of staff in the form of a written safe lifting policy helps maintain program sustainability.</i></p> <p><b>C. How does management reinforce the safe handling policy?</b></p>			
II. Multistakeholder Involvement	Completed	In Progress	N/A
<p><b>B. A safe handling team represents all levels.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Teams should be formed that include a range of staff from all affected departments, including members representing administrators and frontline staff.</i></p>			
<p><b>C. The team is actively involved during the development of the program.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Involve staff during every step of safe handling program implementation (e.g., hazard assessment, technology procurement, education and training, program evaluation).</i></p>			
<p><b>D. Peer champions representing units / shifts are team members</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Peer champions continually remind and educate their peers about the program, answer questions, troubleshoot issues, and promote the culture of safety. There should be a dedicated staff member who fills this role in each department.</i></p>			
III. Needs Assessment	In Place	Not Done	Will Adopt
<p><b>A. Mobility assessment criteria are established and applied to each person in care.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>All persons in care have unique characteristics and mobility capabilities that need to be assessed on a regular basis.</i></p>			
<p><b>B. A handling plan is communicated for all persons in care.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>Once the level of mobility and need for assistance is assessed, that information needs to be communicated to all relevant workers.</p>	Notes		
<b>IV. Equipment</b>			
<p><b>A. Frontline staff is involved in selecting equipment.</b></p> <p><i>The workers who actually move and transfer clients are a valuable resource when determining the most effective equipment.</i></p>	In Place <input type="checkbox"/>	Not Done <input type="checkbox"/>	Will Adopt <input type="checkbox"/>
<p><b>B. Equipment is chosen based on need.</b></p> <p><i>Individual units or clients may have different movement and transfer needs, so make sure to involve staff from all departments.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>C. Equipment is convenient, available, and accessible.</b></p> <p><i>Having appropriate and easy-to-use safe handling equipment conveniently located encourages routine use.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>D. Equipment cleaning, inspection, and maintenance systems are in place.</b></p> <p><i>Equipment needs to be maintained properly and charged at all times. Responsibility for cleaning equipment should be clearly designated. Equipment must be regularly inspected.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>E. Partnership with vendor(s) is considered.</b></p> <p><i>Vendors can help to develop safe handling specifications, troubleshoot issues, answer questions, and maintain equipment.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>F. Construction and remodeling projects take safe handling considerations into account (if applicable).</b></p> <p><i>When undertaking construction and remodeling, it is more effective to design with safe handling in mind than to retrofit afterward.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>V. Education and Training</b>			
<p><b>A. All relevant staff is trained on using equipment.</b></p> <p><i>If the worker uses the equipment correctly and efficiently, outcomes for care will be better.</i></p>	In Place <input type="checkbox"/>	Not Done <input type="checkbox"/>	Will Adopt <input type="checkbox"/>
<p><b>B. All staff is educated on the importance of safe handling.</b></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<p><i>There should be a variety of learning methods available (i.e. on-line learning, self-directed learning, hands-on, safety huddles) and records should be maintained.</i></p>	<p><b>Notes</b></p>		
<p><b>C. Staff is trained on equipment annually, after an extended absence, when newly hired, and when new equipment is purchased.</b></p> <p><i>Including safe handling in annual competency reviews helps promote the program and equipment proficiency.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Residents/clients/families are educated on policy/equipment.</b></p> <p><i>Educating residents/clients and their family members about your organization's policy and use of equipment will engage them in the safe handling process</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>VI. Program Evaluation (completed annually)</b></p>	<p><b>In Place</b></p>	<p><b>Not Done</b></p>	<p><b>Will Adopt</b></p>
<p><b>A. Metrics are tracked to evaluate program success.</b></p> <p><i>You can track the success of your program by examining the number and type of staff injuries, specific activities that led to these injuries, number of lost work or modified duty days, and the effectiveness of the safe handling policy.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>B. Improvements to the safe handling program are considered.</b></p> <p><i>Every program needs adjustment after being put into practice. Even small changes can improve safe handling tremendously in your organization.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<p><b>Notes</b></p>		

Adapted from OSHA, United States Department of Labour  
[https://www.osha.gov/dsg/hospitals/documents/3.2\\_SPH\\_checklist\\_508.pdf](https://www.osha.gov/dsg/hospitals/documents/3.2_SPH_checklist_508.pdf)  
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