

Safe Patient Handling and Mobility Toolkit – Tool 3b

To learn more about using this tool and other assessment methods to identify and rank hazards and risks in patient handling, refer to the Section 3 in the Safe Patient Handling and Mobility: A Toolkit for Program Development 2025 at: <https://www.nvha.net/safe-patient-handling-and-mobility-toolkit/>

Employee Perception Survey of Patient Handling Tasks – Various Units/Departments

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Note: For health care facilities with SPHM technology - consider including questions from the employee survey tool 8b SPHM Post Implementation Survey and Report Template.

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<p>Safe Patient Handling and Mobility Program Plan Survey of Patient Handling & Mobility Practices STAFF SURVEY</p>	<p>ABC Hospital</p>
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Insert introduction and instructions for Staff here

Example

ABC hospital is implementing a Safe Patient Handling and Mobility (SPHM) program. *Add information about the need for an SPHM program e.g., any state SPHM regulatory requirements and/or program goals and the role of the SPHM Committee.*

To ensure that an effective and sustainable SPHM program is implemented at the hospital, the SPHM Committee will be soliciting input from unit/department managers and staff throughout the development, implementation, and evaluation of the program.

As part of this initiative SPHM lift equipment and assistive devices will be purchased for staff to use when moving and lifting patients who cannot move themselves.

To help us determine the type and quantity of equipment that is needed for each unit or department where patients are lifted or moved, the SPHM Task Force needs your input about the patient lifting and moving tasks that you perform during a typical work shift.

Please go to *(insert link to survey)* take a few minutes to answer the following questions about the patient handling and mobility tasks in your unit/department.

Directions for Managers:

Have as many staff as possible on each shift complete the survey

Surveys should be completed by (Date)

Add link to Survey

Questions:

Contact:

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Identifying and Prioritizing Patient Handling Tasks

MEDICAL, SURGICAL, ORTHOPEDICS, NEURO, IN-PATIENT REHAB UNITS, INTENSIVE CARE UNITS, ONCOLOGY

At least 1 RN and 1 Aide should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

**RN/CNA/Therapist/
Other please
specify:**

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring patient to/from bed and wheelchair, shower/commode or geri/cardiac chair			
2. Transferring patient to/from wheelchair or chair and toilet			
3. Transferring a patient to/from bed and stretcher or gurney			
4. Repositioning patient in bed from side to side			
5. Repositioning patient to the head of the bed			
6. Repositioning patient in geri/cardiac chair or wheelchair			
Holding or supporting the weight of a limb during medical or nursing procedures			
7. Holding a patient on their side during medical or nursing procedures			
8. Ambulation from bed or chair			
9. Preventing falls when assisting a patient to stand, transfer or ambulate			
10. Lifting a patient up from the floor			
11. Bathing a patient in bed			
12. Positioning patient on a bed pan			
13. Changing absorbent pad			
14. Making an occupied bed			
15. Feeding bed-ridden patient			
16. Weighing a patient			
17. Bathing a patient in a shower chair or trolley			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
18. Handling or mobilizing a confused or combative patient			
19. Transporting patient off unit			
20. Undressing/dressing a patient			
21. Applying anti-embolism stockings			
22. Transferring patient to/from car			
23. Other Patient Handling Task (List): <i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., pushing food carts, IV equipment, handling wet linens)</i>			
24. Non-Patient Handling Tasks (List):			
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks

FAMILY BIRTH CENTER (Labor & Delivery; Post Partum, Neonatal Care, etc)

At least 1 RN and 1 Aide should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

RN/CNA/Other:

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring patient to/from bed and wheelchair, shower/commode or chair			
2. Transferring patient to/from wheelchair or chair and toilet			
3. Transferring a patient to/from bed and stretcher or gurney			
4. Transferring patient to/from bathtub/waterbirth pool to chair			
5. Repositioning patient in bed/gurney from side to side/ to head of bed			
6. Repositioning patient in chair or wheelchair			
7. Holding or supporting the weight of a limb for during labor & delivery or other procedure for more than a few minutes			
8. Ambulation from bed or chair			
9. Transferring patient to/from wheelchair or shower/commode or Geri/Cardiac chair to bed			
10. Transferring patient to/from wheelchair or chair and toilet			
11. Preventing falls when assisting a patient to stand, transfer or ambulate			
12. Lifting a patient up from the floor			
13. Bathing a patient in bed			
14. Positioning patient on a bed pan			
15. Changing absorbent pad			
16. Making an occupied bed			
17. Weighing a patient			
18. Transporting patient off unit			
19. Undressing/dressing a patient			
20. Applying anti-embolism stockings			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
21. Other Patient Handling Task (List): <i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., setting up birth beds, pushing food carts, IV equipment, handling wet linens)</i>			
22. Non-Patient Handling Tasks (List):			
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks

EMERGENCY DEPT.

At least 1 RN, 1 Aide and 1 Tech should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

RN/CNA/Tech/
Other please
specify:

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring patient to/from wheelchair or commode chair and gurney/bed			
2. Transferring patient to/from bed and wheelchair, shower/commode or geri/cardiac chair			
3. Transferring patient to/from wheelchair or chair and toilet			
4. Transferring a patient to/from bed and stretcher or gurney			
5. Transferring patient to/from car			
6. Transferring a patient from an ambulance			
7. Repositioning patient in bed/gurney from side to side/to head of bed			
8. Repositioning patient in chair or wheelchair			
9. Holding or supporting the weight of a limb during medical or nursing procedures			
10. Holding a patient on their side during medical or nursing procedures			
11. Ambulation from bed or chair			
12. Preventing falls when assisting a patient to stand, transfer or ambulate			
13. Lifting a patient up from the floor			
14. Lifting head of occupied non-powered stretcher/gurney or bed (when patient cannot assist)			
15. Positioning patient on a bed pan			
16. Changing absorbent pad/sheet while patient is on the gurney/bed			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
17. Handling or mobilizing a confused or combative patient			
18. Weighing a patient			
19. Undressing/dressing a patient			
20. Applying anti-embolism stockings			
21. Transporting patient to/from department			
22. Other Patient Handling Task (List): <i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., IV equipment, handling wet linens)</i>			
23. Non-Patient Handling Tasks (List):			
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks OR & SURGICAL CENTER, PACU

At least 1 RN, 1 Aide and 1 Tech should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

RN/CNA/Tech/
Other please
specify:

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring a patient to/from bed and stretcher/gurney or OR table			
2. Transferring patient to/from wheelchair or commode chair and gurney/bed			
3. Repositioning patient in bed/gurney from side to side/to head of bed			
4. Repositioning patient on OR table			
5. Turning a patient to/from supine and prone position before and/or during surgery			
6. Holding or supporting the weight of a limb while performing surgical prep			
7. Holding or supporting the weight of a limb during surgery			
8. Holding or supporting the weight of a pannus while performing surgical prep			
9. Holding or supporting the weight of a pannus during surgery			
10. Retract pannus or hold leg during Foley catheter insertion			
11. Transporting patient off unit			
12. Lifting a patient up from the floor			
13. Preventing falls when assisting a patient to stand, transfer or ambulate			
14. Undressing/dressing a patient			
15. Applying anti-embolism stockings			
16. Positioning patient on a bed pan			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
17. Transferring patient to/from wheelchair or chair and toilet			
18. Repositioning patient in chair or wheelchair			
19. Ambulation from bed/gurney or chair			
20. Lifting head of occupied non-powered stretcher/gurney or bed (when patient cannot assist)			
21. Transferring a patient to/from bed and stretcher or gurney			
22. Weighing a patient			
23. Bathing a patient in bed			
24. Transporting patient to/from department			
25. Other Patient Handling Task (List): <i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., pushing OR equipment, carts, IV equipment, handling wet linens)</i>			
26. Non-Patient Handling Tasks (List):			
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Optional Survey Questions for Operating Room Staff Related to Materials Handling

Non-Patient Handling Tasks - OR that involve lifting, pushing or pulling, carrying, hand force or static holding/positioning (e.g., pushing equipment, holding retractors, carrying case trays)	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
<p>1. Moving equipment in and out of OR rooms (E.g. microscopes, monitors, case carts, surgical beds, etc.)</p> <p><i>Please list the 5 examples of equipment you most commonly move and complete the corresponding frequency and risk box for that equipment:</i></p> <ul style="list-style-type: none"> i. ii. iii. iv. v. 			
2. Moving beds/stretchers in and out of OR rooms			
<p>3. Assembling and disassembling specialty procedure tables (e.g. OSI Jackson or Flat top, urology table or reconfiguring an OR table for a specific procedure)</p> <p><i>Please list name of the table (s):</i></p>			
4. Accessing and moving case carts			
5. Lifting and carrying instrument trays			
6. Holding retractors or other equipment during surgery			
7. Using a computer workstation in an OR room			
8. Opening packages			
9. Reaching and bending; accessing equipment and other items at floor level – <i>please briefly describe:</i>			
10. Other tasks: Please list			

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Identifying and Prioritizing Patient Handling Tasks RADIOLOGY DEPARTMENTS

At least 1 RN, 1 Aide and 1 Tech should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

RN/CNA/Tech/
Other please
specify:

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring a patient to/from bed/stretcher or gurney to imaging table			
2. Transferring patient to/from wheelchair to imaging table			
3. Transferring patient to/from wheelchair or chair and toilet			
4. Repositioning patient in bed/gurney or on imaging table			
5. Repositioning patient in chair or wheelchair			
6. Ambulation from Imaging table			
7. Transporting patient to/from department			
8. Undressing/dressing a patient			
9. Holding or supporting the weight of a limb during a procedure			
10. Lifting head of occupied non-powered stretcher/gurney or bed (when patient cannot assist)			
11. Lifting patients to help position an x-ray plate			
12. Lifting a patient up from the floor			
13. Preventing falls when assisting a patient to stand, transfer or ambulate			
14. Other Patient Handling Task (List):			
<i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., IV equipment, handling wet linens)</i>			
15. Non-Patient Handling Tasks (List):			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks

IN PATIENT PHYSICAL THERAPY

At least 1 RN and 1 Aide should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

RN/CNA/Therapist/
Other please
specify:

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring patient to/from bed and wheelchair, shower/commode or geri/cardiac chair			
2. Transferring patient to/from wheelchair or chair and toilet			
3. Repositioning patient in bed			
4. Repositioning patient in geri/cardiac chair or wheelchair			
5. Holding or supporting a patient during therapy			
6. Ambulation from bed or chair			
7. Transferring a patient to/from bed to stretcher or gurney			
8. Applying a CPM or similar device			
9. Lifting and manipulating limbs			
10. Transferring patient to/from wheelchair and therapy mat or surface (rehab gym)			
11. Transferring a patient to/from wheelchair and hydrotherapy/pool (rehab gym)			
12. Repositioning patient on therapy mat or surface (rehab gym)			
13. Undressing/dressing a patient			
14. Applying anti-embolism stockings			
15. Changing absorbent pad			
16. Preventing falls when assisting a patient to stand, transfer or ambulate			
17. Lifting a patient up from the floor			
18. Handling or mobilizing a confused or combative patient			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
19. Transporting a patient to/from unit/dept. in a wheelchair			
20. Other Patient Handling Task (List): <i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., lifting traction devices, walkers, crutches, IV equipment, etc.)</i>			
21. Non-Patient Handling Tasks (List): What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks OUTPATIENT PHYSICAL THERAPY

At least 1 RN and 1 Aide should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

**RN/CNA/Therapist/
Other please
specify:**

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring patient to/from wheelchair and therapy mat or surface (rehab gym)			
2. Transferring patient to/from wheelchair or chair and toilet			
3. Ambulation from therapy surface or wheelchair/ chair			
4. Transferring a patient to/from wheelchair and hydrotherapy/pool (rehab gym)			
5. Repositioning patient on therapy mat or surface (rehab gym)			
6. Repositioning patient in chair or wheelchair			
7. Holding or supporting a patient during therapy			
8. Performing range of motion exercises with patient in chair or other surface			
9. Applying a CPM or similar device			
10. Undressing/dressing a patient			
11. Applying anti-embolism stockings			
12. Lifting and manipulating limbs			
13. Preventing falls when assisting a patient to stand, transfer or ambulate			
14. Lifting a patient up from the floor			
15. Other Patient Handling Task (List):			
Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., lifting traction devices, walkers, crutches,, etc.)			
16. Non-Patient Handling Tasks (List):			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks

TRANSPORTATION

At least 1 RN and 1 Aide should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

**RN/CNA/Therapist/
Other please
specify:**

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transporting a patient in a bed or gurney/stretcher			
2. Transporting a patient in a wheelchair			
3. Transferring a patient from a bed to/from a gurney			
4. Transferring a patient to/from bed/gurney to imaging/exam table			
5. Transferring patient to/from wheelchair to imaging/exam table or bed			
6. Transferring patient to/from wheelchair to toilet			
7. Repositioning patient in bed/gurney or on imaging/exam table			
8. Repositioning patient in wheelchair/chair			
9. Ambulation from bed/gurney/imaging or exam table			
10. Transferring patient to/from car			
11. Lifting a patient up from the floor			
12. Lifting head of occupied non-powered stretcher/gurney or bed (when patient cannot assist)			
13. Lifting patients to help position an x-ray plate			
14. Physically restraining a combative/agitated patient			
15. Other Patient Handling Task (List):			
<i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., lifting and moving furniture in a patient room for access, etc.)</i>			
16. Non-Patient Handling Tasks (List):			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			

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Identifying and Prioritizing Patient Handling Tasks

OUTPATIENT CLINICS

At least 1 RN and 1 Aide should complete this per shift

Department:

Shift:

Employee Name:
(Optional)

RN/CNA/Therapist/
Other please
specify:

Directions: Estimate the frequency and # of times that a task is performed each shift. Assign a rank from 1 (highest risk) to 10 (lowest risk) to the tasks you consider to be the highest risk tasks contributing to musculoskeletal injuries e.g. back strain for persons lifting and moving patients and/or equipment.

Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
1. Transferring patient to/from wheelchair and exam table			
2. Transferring patient to/from wheelchair and toilet			
3. Transferring a patient to/from stretcher or gurney and exam/procedure table			
4. Repositioning patient on exam/procedure table			
5.			
6. Repositioning patient in wheelchair			
Holding or supporting the weight of a limb during a procedure			
7. Holding a patient on their side during procedure			
8. Ambulation from exam/procedure table			
9. Preventing falls when assisting a patient to stand, transfer or ambulate			
10. Lifting a patient up from the floor			
11. Weighing a patient			
12. Transporting patient to/from clinic wheelchair			
13. Undressing/dressing a patient			
14. Applying anti-embolism stockings			
15. Assisting/mobilizing a confused or combative patient			
16. Transferring patient to/from car			
17. Lifting head of occupied non-powered stretcher/gurney or bed (when patient cannot assist)			
18. Other Patient Handling Task (List):			

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Patient Handling Tasks	Frequency of Task H=high M=Moderate L=Low	How many times is task performed per Shift (approx.)	Risk of Task 1 = High Risk 10 = Low Risk
<i>Non-Patient Handling Tasks that involve lifting, carrying, pushing or pulling (e.g., carrying medical supplies)</i>			
19. Non-Patient Handling Tasks (List):			
What equipment and processes would make patient handling and mobility tasks safer and easier for you to perform?			
Please list barriers that you think might exist to using SPHM equipment such as ceiling lifts, floor lifts, sit-to-stand lifts, slider sheets etc., for patient handling and transfers?			
Additional Comments:			