

Safe Patient Handling and Mobility Toolkit – Tool 4e

To learn more about using this tool refer to the Section 4 in the Safe Patient Handling and Mobility: A Toolkit for Program Development 2025 at: <https://www.nvha.net/safe-patient-handling-and-mobility-toolkit/>

Safe Patient Handling and Mobility (SPHM) Program Sample Program Policy Template & Sample Policy Resources

Organization Name	
Policy Title:	Policy Number:
Approved By:	Effective Date:
Applicable to:	Origination Date/Next Review Date
Purpose of the Policy	
Include reference to applicable SPHM state regulations and/or ANA SPHM standards 2021 & the intent of the SPHM program (objectives) and organizations' commitment to support the program	
Definitions	
<i>Examples to define:</i> <ul style="list-style-type: none">• Manual patient handling• Musculoskeletal disorders (MSDs)• High-risk patient handling tasks• Safe patient handling and mobility• Safe patient handling and mobility technology• Culture of safety• Exceptional care circumstances (<i>SPHM equipment would not be used</i>)• Safety huddles/after action review process• SPHM mobility assessment protocols &• Patient dependency/mobility levels of assist	
Policy Statement	

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Requirements

Summary of approach that will be used to address high-risk patient handling tasks such as:

- Compliance
- SPHM requirements/use of equipment and exceptions
- Education and training expectations
- Accessibility of equipment and support to staff
- SPHM mobility assessment protocols
- Reporting & non-retaliation policy
- After action review
- Culture of safety
- Patient/family & employee refusal to use SPHM equipment

Roles and Responsibilities/Delegation of Authority

Leadership/Senior Management	
Unit/Dept. Managers/Supervisors	
Caregivers (including contract staff)	
SPHM Program Coordinator/Manager	
SPHM Program Committee	
SPHM Unit-Based Champions/Coaches	
Employees who provide program support e.g. environmental services; facilities maintenance; clinical technology; infection prevention and control; wound and ostomy; occupational Health and/or safety and ergonomics staff; procurement; patient safety/quality/risk management; clinical education, etc. <i>Define roles and Responsibilities for each group</i>	

Available Resources

References

Appendices

Details about program elements and procedures including those for specific patient populations etc., can be included here

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The following are examples of SPHM policies

- Veterans Health Administration. VHA Directive 1611 - Safe Patient Handling and Mobility Program July 2023 https://www.va.gov/vhapublications/ViewPublication.asp?pub_ID=10367
- Safe Care BC Safe Resident and Client Handling Policy <https://safecarebc.ca/resources/templates/safe-resident-and-client-handling-policy/>
- New York State Insurance Fund Safe Patient Handling Policy example 2022. https://ww3.nysif.com/-/media/Files/PHS--FS_PAD_UW/Field_Services/SPH/SPH-Policy-2022.pdf
- Western New York Council on Occupational Safety and Health (WNYCOSH) (2016). Safe Patient Handling Workgroup Report to the Commissioner of Health. New York State Dept. of Health.

Sample policies in:

Appendix C. Kaleida Health Safe Patient Handling Policy

Appendix D. New York State Veterans Home at Batavia Zero Lift Policy

Appendix E. Heritage Ministries Safe Resident Handling Zero Lift Policy

Appendix G. WNYCOSH Safe Patient Handling Sample Policy

https://www.health.ny.gov/statistics/safe_patient_handling/docs/sph_report.pdf