

Practice Guideline

Transferring Clients



COLLEGE OF NURSES
OF ONTARIO
ORDRE DES INFIRMIÈRES
ET INFIRMIERS DE L'ONTARIO

THE STANDARD OF CARE.

Introduction

Increasing numbers of clients require transfer from one health care facility to another, or to different sites of the same facility, to access more advanced technology or more specialized caregivers. Nurses often accompany clients on such transfers. Giving care while transferring a client in either a land vehicle or an aircraft differs from giving care in a facility. The College of Nurses of Ontario (CNO) has developed this guideline to provide direction to nurses involved in transferring clients. Suggestions about building quality practice settings and for individuals who arrange for the transfer of clients to support nurses transferring clients are included at the end of this fact sheet. These standards are an adjunct to the *Standards of Dedicated Transport Teams*.

The individual who arranges the transfer is responsible, on behalf of the practice setting, for ensuring that the required systems are in place to enable the nurse to provide safe, effective and ethical care to the client. This includes arranging the appropriate vehicle, ensuring that the receiving facility is prepared for the client, and that a nurse with the competence required to meet the client's needs is assigned the responsibility.

Depending on client complexity, predictability and risk of negative outcomes, the nurse may be an RPN or RN. Individuals making decisions about accompanying nurses need to consult CNO's *Utilization of RNs and RPNs* practice guideline.

Practice expectations

The nurse needs to have the knowledge, skill and judgment to do as follows:

- assess the need for an intervention and the appropriateness of performing the intervention;
- perform the required intervention (those that are established and those that develop during the transfer);

- make all of the decisions required during the intervention; and
- manage all possible outcomes of performing the intervention.

1. General accountabilities of the accompanying nurse

The nurse is accountable for her/his actions, decisions and behaviours prior to, during and following the transfer. The nurse follows this guideline by:

- being competent to function independently and provide care in any possible emergency situation that might arise;
- being aware of the location of emergency equipment and the emergency procedures;
- being aware of the effect of changes in air pressure on the client's medical condition if the client is transferred by air;
- being aware of the roles and abilities of those who participate in the transfer with the nurse (e.g. emergency care attendants or paramedics);
- recognizing that travel may be stressful to the client and being prepared to use strategies to minimize the stress;
- being aware of who is responsible for care at the receiving facility. This may vary depending on the reason for transfer (e.g., admission to the receiving facility versus accompanying the client for a procedure and then returning with the client to the original facility);
- locating required resources available in the receiving facility and understanding the emergency procedures in the receiving facility if the transferring nurse keeps responsibility for the client after arrival; and
- being aware of the arrangements for return to the original facility for the client (if required) and the nurse.

2. Preparing for transfer

The nurse follows this guideline by:

- ensuring that the client or substitute decision-maker, if the client is not competent, has consented to the transfer;
- knowing how the receiving facility will obtain information collected during transfer if the client is being transferred permanently;
- ensuring that a physician at the receiving facility has agreed to assume responsibility for care and a bed is available for the client if the client is being transferred for the purpose of admission;
- ensuring that the required equipment is available in the land or air ambulance (e.g., blood pressure apparatus, suction machine, medication) and doing a quick assessment of the equipment that she/he will be using;
- ensuring that the equipment functions properly and has been checked for variations from the norm, and batteries are fully charged; and
- checking any equipment brought for the transfer, despite the likelihood that the ambulance has a preventive maintenance program in place.

3. During transfer

The nurse follows this guideline by:

- providing the required care;
- acting as the client's advocate to ensure that the client receives safe, ethical and effective care;
- using good communication techniques to establish who is providing what care; and
- documenting all assessment and monitoring, analysis of the data, action taken and the client's response.

4. After transfer

The nurse follows this guideline by:

- evaluating the experience and forwarding any suggestions for improving the process to her/his manager.

- nurses obtain the necessary knowledge and skills needed to transfer clients safely (e.g., knowing the changes that air pressure/altitude may have on a client's condition);
- the resources necessary for the nurse to care for the client safely during transfer, including equipment and forms to document the care given during transfer, are provided. The receiving facility needs to provide space for the client so that care can be safely provided and the dignity of the client can be assured;
- there is an agreement or understanding between the sending and receiving facilities about who will provide nursing care when the client is in the receiving facility. If the accompanying nurse is expected to continue caring for the client in the receiving facility, the agreement needs to include an orientation to the environment for the accompanying nurse;
- the nurse is assisted in meeting the client's needs in the receiving facility as necessary; and
- relief for the nurse to attend to her personal needs is provided.

Conclusion

If the nurse is competent and structures are in place to facilitate the transfer and care, clients will receive safe, effective and ethical care.

For more information

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Maintaining a quality practice setting

Quality practice settings support nurses transferring clients by ensuring that:

- the accompanying health care professional is competent to meet the client's care needs safely during the transfer;