



<p>Team Name: Home Care Leadership</p> <p>Team Lead: Director Home Care, Palliative Care & Seniors</p> <p>Approved by: Regional Lead Community & Continuing Care</p>	<p>Reference Number: CLI.5411.PL.008</p> <p>Program Area: Home Care</p> <p>Policy Section: Service Delivery</p>
<p>Issue Date: January 24, 2022</p> <p>Review Date:</p> <p>Revision Date:</p>	<p>Subject: Home Care Assignment of Tasks to Home Care Attendants</p>

Use of pre-printed documents: Users are to refer to the electronic version of this document located on the Southern Health-Santé Sud Health Provider Site to ensure the most current document is consulted.

POLICY SUBJECT:

Home Care Assignment of Tasks to Home Care Attendants

PURPOSE:

To ensure client’s health care needs are met in a safe, appropriate, efficient and effective manner when tasks are assigned to a Home Care Attendant.

BOARD POLICY REFERENCE:

Executive Limitation (EL-02) Treatment of Clients
 Executive Limitation (EL-03) Treatment of Staff

POLICY:

Case Coordinators may assign client-care tasks to a Home Care Attendant provided the following conditions are met:

- Task is within the Case Coordinator’s scope of practice.
- Task is identified as a Southern Health-Santé Sud Assigned Tasks.
- Client’s health status is stable and the client’s response to the proposed task or procedure is predictable.
- Client’s overall care requirements and circumstances support the utilization of a Home Care Attendant to provide the required assigned task.
- Home Care Attendant has the training and ability to perform the task safely.
- Ongoing support and supervision are available to the Home Care Attendant to support performance of the assigned task.
- Task falls within the scope of employment/position description of the Home Care Attendant and employer policies.

- Assigned tasks that require client specific training are:
 - Specific to one client, and not transferable to another client.
 - Specific to one Home Care Attendant and are not transferable to another Home Care Attendant.

DEFINITIONS:

Activities of daily living: Activities normally performed by the client or their family member as part of self- care. To assess a task as a routine activity of daily living, the need, response and outcome of the task must be predictable. Activities of daily living may include restricted acts under the Regulated Health Professions Act of Manitoba typically performed by a Regulated Health Professional (e.g. medication administration).

Assignment: Transfer of a task that is considered an activity of daily living normally performed by a Regulated Health Professional to a Home Care Attendant. This task occurs within the scope of practice of a Case Coordinator and within the scope of employment of a Home Care Attendant. The responsibility for the task remains with the employer.

Client Specific Training: Specific training surrounding an identified task, that because of client circumstances requires training of each care provider in the client situation, and where the training for the task is not transferable to another client. Training may take place in client home, or elsewhere such as community area office.

Medication Administration: An activity of preparing, giving, and evaluating prescription and non-prescription medications to a client for the purpose of immediate ingestion, application, inhalation, insertion, instillation or injection. More than just the psychomotor task of giving a medication to a client, this service involves the assessment skills and clinical decision making of a Nurse. Medication administration may include giving medications where:

- An assessment or decision is required prior to giving the medication (e.g. checking heart rate prior to giving digoxin).
- There is a risk of an unpredictable outcome which may endanger the client's health, mental health or overall well-being and an evaluation of the outcome of the medication is needed (e.g. new opioid prescription).
- A degree of skill is required by the Nurse to ensure that it is given appropriately in the context of the client, task, provider and environment. This task involves numerous steps and a high degree of technical/psychomotor skill (e.g. complex medication systems such as multiple syringes).

Medication Assignment: A service provided to ensure a client takes medication as intended by the prescriber in cases where the client is unable to take the medication safely and independently. This service may include assisting the client with medications for immediate ingestion, application, inhalation, insertion/instillation or setting out of medications for client to take at a later time. The task of medication assignment is routine and performed as part of daily care. It involves few steps and minimal technical psychomotor skill with predictable outcomes.

- Medication assignment may include the following:
 - Opening of pharmacy prepared medication packaging.

- Putting medications in client's mouth (where client is not physically able to use their hands/arms).
- Pre-measured liquids (provided in syringe labelled by pharmacy, prepared by Direct Service Nurse).
- Mixing pills or crushed/powdered medications (pre-measured/pharmacy crushed) into a medium such as yogurt, applesauce as identified by the Case Coordinator and/or Speech Language Pathologist. **Note:** Home Care Attendant are not permitted to crush or cut medications.
- Medication may be set out for the client to take prior to next visit, client must meet the following criteria:
 - Unable to remove their medication from the blister pack (e.g. arthritic hands).
 - Client is not cognitively impaired.
 - Client/Family/Caregiver understand the risk with a medication set out as outlined by the Case Coordinator.

Non-Client Specific Training: Training provided for assigned tasks to one or more Home Care Attendants that is not specific to any one client and may be transferrable to another client.

Case Coordinator: Health Care Professional governed by a regulatory body (e.g. Social Worker/Registered Nurse/Occupational Therapist).

IMPORTANT POINTS TO CONSIDER:

- Organizations and Health Care Providers involved in the delivery of Home Care services have a responsibility to provide safe care and report any issues or discrepancies related to assignment to the client's Case Coordinator or Resource Coordinator as they arise.
- Case Coordinators are responsible for comprehensive client assessments, including environmental and contextual factors. The assessment, evaluation and judgment of the Case Coordinator cannot be assigned.
- Training of the Home Care Attendant is performed a number of ways depending on the task, client circumstances and client's overall care requirements. This training may include:
 - Theoretical component.
 - Practical component.
 - Alternate methods of instruction such as group lecture, video, computer assisted learning, independent study and return demonstration.
 - Ongoing monitoring and supervisory/evaluation visits.
- Competence of a Home Care Attendant is achieved/sustained a number of ways. This includes but is not limited to the following:
 - Standardized, comprehensive orientation and ongoing training.
 - Assigned task sign off sheets, reviewed by Direct Service Nurse/Nurse Educator and follow up with Resource Coordinator if required.
 - Ongoing supervisory visits of the Home Care Attendant by the supervising Resource Coordinator/Nurse Educator/Designate.
 - Assigned task monitoring visits by Direct Service Nurse for ongoing evaluation.

- Training plan for client specific tasks developed by Case Coordinator.
- Re-assessment if client/family/caregiver/ Home Care Attendant or Case Coordinator identify a concern/issue.
- Monitoring of the client and Home Care Attendant is an essential component in the process of assignment of tasks. The presence or absence of the following factors have an impact on the frequency with which monitoring may be required:
 - Predictability of outcomes of care.
 - Nature and complexity of task.
 - Risks involved in carrying out the task.
 - Client's overall condition of health.
- Home Care Assignment of Tasks to Home Care Attendant documents are located on the Health Provider's Site (HPS)/Programs and Services/Home Care/Assignment Task Plans and Training Records.

PROCEDURE:

1. The Case Coordinator:
 - Completes the client assessment and confirms client's eligibility for Home Care.
 - Determines client care needs and identifies those that fall within the approved Southern Health-Santé Sud Assigned Tasks List (CLI.5411.PL.008.SD.01).
 - Determines with client/family/caregiver, client's back up plan in event the Home Care Attendant or Direct Service Nurse is unavailable to perform task and records on MG-1840.
2. If the task falls within the approved assignment task list and the Case Coordinator's scope of practice, the Case Coordinator completes the Assigned Task Condition Assessment form located on the Health Provider's Site (HPS)/Programs and Services/Home Care/Assignment Task Plans and Training Records and proceeds to procedure number 4.
3. If the task falls within the approved assignment task list, but **does not** fall within the Case Coordinator's scope of practice or the Case Coordinator is unable to complete the Assigned Task Condition Assessment (e.g. unable to assess client prior to date service implementation required):
 - **The Case Coordinator:**
 - Consults/collaborates with team members (Case Coordinator/Direct Service Nurse/Nurse Educator - Client Specific Services) whose practice the assigned task falls within regarding the appropriateness of assignment to a Home Care Attendant. If team member(s) confirm task is appropriate for assignment, Case Coordinator completes the Assigned Task Condition Assessment for the task and proceeds to procedure number 4, or
 - Submits a Nursing Service Request, requesting the Direct Service Nurse complete the Assigned Task Condition Assessment and includes the following documents specific to the assigned task:
 - Assigned Task Condition Assessment;
 - Home Care Attendant Assignment Group Task Plan;
 - Home Care Attendant Assignment Client Specific Task Plan;
 - Home Care Medication Assignment Record – Home Care Attendant;

- Home Care Treatment/Care Plan Activity Record – Home Care Attendant.
 - Completes Respiratory Therapist, Occupational Therapist, Physiotherapist or Speech Language Pathologist assessment/recommendations specific to the task.
 - Completes Medication Reconciliation (if assigned task involves medications).
 - **The Nurse Scheduler:**
 - Assigns Direct Service Nurse to complete the Assigned Task Condition Assessment.
 - **The Direct Service Nurse:**
 - Completes the Assigned Task Condition Assessment, supporting documents and submits to the Case Coordinator.
4. Task **meets** conditions for assignment to Home Care Attendant:
 - Case Coordinator/Direct Service Nurse identifies and records type of training required, group or client specific based on the Southern Health-Santé Sud Assigned Tasks List and documents on the Assigned Task Condition Assessment Form.
 5. Task **does not meet** condition for assignment to a Home Care Attendant:
 - Case Coordinator/Direct Service Nurse records on the Assigned Task Condition Assessment Form that client does not meet conditions and states rationale.
 - Direct Service Nurse returns the completed document to the Case Coordinator.
 - Case Coordinator reviews conditions of assignment not met and determines corrective measures to enable client to meet conditions of assignment. If unable to assign task to Home Care Attendant, Case Coordinator explores alternate means of care provision (e.g. Direct Service Nurse to provide care).
 6. Client specific training not required:
 - **The Case Coordinator:**
 - Enters the assigned task(s) to be completed by Home Care Attendant on V2020 Home Care Attendant/Home Support Worker Service Request (CLI.5410.SG.002.FORM.01).
 - Submits new and updated requests to the Resource Coordinator - Home Care Attendant, including the Home Care Attendant Assignment Task Plan and supporting documents (e.g. Home Care Medication Record – Home Care Attendant) to place in client home care folder.
 - **The Resource Coordinator - Home Care Attendant/Designate:**
 - Verifies the Home Care Attendants have the required group training to perform the task.
 - Coordinates placement of updated Home Care Attendant/Home Support Worker Service Request and supporting documents (e.g. Home Care Medication Record – Home Care Attendant) in the client’s home care folder.
 - Identifies group training needs and coordinates training with the Nurse Educator - Client Specific Services.
 7. Client specific training required:
 - **The Case Coordinator in collaboration with other Health Team Members:**
 - Identifies and documents client specific training needs on the Home Care Attendant Task Plan Client Specific form located on the Health Provider’s Site (HPS)/Programs and Services/Home Care/Assignment Task Plans and Training Records. If the Home Care Attendant Task Plan Client Specific is completed by the Direct Service Nurse, the Direct Service Nurse submits completed form to the Case Coordinator.

- Submits Nursing Service Request along with the Home Care Attendant Task Plan Client Specific to the Nurse Educator - Client Specific Services requesting training of the Home Care Attendant.
 - **The Nurse Educator - Client Specific Services:**
 - Reviews documents received for completion and identifies client specific training requirements.
 - Completes Section A of the Home Care Assigned Task Training Request Form (CLI.5411.PL.008.FORM.01) submits to the Resource Coordinator/Scheduler - Home Care Attendant and Nurse Scheduler.
 - Coordinates/provides training for the Home Care Attendants with the Nurse Scheduler and Resource Coordinator/Scheduler - Home Care Attendant.
 - Receives/reviews and confirms Home Care Attendant meets criteria to perform assigned task.
 - Enters client specific training completed by Home Care Attendants in Procura under Employee Service Requirements.
 - Sends a task to the Resource Coordinator that client specific training is complete.
 - **The Resource Coordinator/Scheduler - Home Care Attendant:**
 - Completes Section B of the Home Care Assigned Task Training Request Form, submits via email to Nurse Educator – Client Specific Services or Nurse Scheduler dependent on who is assigned for training noted in Section A.
 - Coordinates/schedules Home Care Attendant(s) for client specific training with the Nurse Educator/Nurse Scheduler.
 - Verifies the Home Care Attendant(s) involved in client’s care has completed the required client specific training to perform the task.
 - Coordinates placement of updated Client Care Plan and Home Care Attendant Task Plan Client Specific and supporting documents (e.g. medication record) in the client’s Home Care folder.
 - Notifies the Case Coordinator via task that the client specific training is completed and date care will commence.
 - Files the Home Care Attendant Assignment Task Training Record and completes follow up if identified on training record.
8. Assigned Task Monitoring
- **The Case Coordinator:**
 - Submits request for Direct Service Nurse to complete the Assigned Task Monitoring Record (CLI.5411.PL.008.FORM.03) in accordance with the frequency of monitoring identified on the Southern Health-Santé Sud Assigned Tasks List.
 - Reviews the completed Assigned Task Monitoring Record and initiates follow up to ensure actions taken on concerns identified.
9. Roles and Responsibilities
- **The Direct Service Nurse:**
 - Provides client specific training as requested.
 - Completes the Home Care Attendant Assignment Task Training Record and scans to the Nurse Educator- Client Specific Services.
 - Completes the Assigned Task Monitoring Record and submits to the Case Coordinator.

- **The Resource Coordinator/Scheduler - Home Care Attendant:**
 - Notifies the Nurse Educator - Client Specific Services and requests training of newly assigned Home Care Attendants when changes occur to assigned Home Care Attendants schedules impacting client specific assigned tasks, (e.g. new Home Care Attendant assigned to client, no longer attending client, etc.).
 - Provides ongoing supervision to assess Home Care Attendant's ability to perform tasks within their position description.
 - Conducts Home Care - Home Care Attendant Ride Along Observation (CLI.5411.PL.08.FORM.02).
- **The Nurse Scheduler:**
 - Schedules Direct Service Nurse to complete Assigned Task Condition Assessment, Home Care Attendant training and/or monitoring.
 - Notifies Nursing Supervisor if difficulty scheduling Direct Service Nurse to complete client assessment for training or monitoring visits.
- **The Home Care Attendant:**
 - Identifies and addresses own learning needs.
 - Attends scheduled client specific training visits as assigned.
 - Upon completion of training, Home Care Attendant to report issues/concerns to Resource Coordinator - Home Care Attendant, if identified an additional training session may be scheduled.
 - Notifies Resource Coordinator – Home Care Attendant of:
 - Change in client status.
 - Inconsistencies between care plan and service provided.
 - If clients are performing tasks independently.
 - Inappropriate or incomplete documentation observed on the medication/treatment record.
 - Transports client v2020 Home Care Attendant/Home Support Worker Service Request and supporting documents to and from client's homes as directed.
- **The Nurse Educator – Client Specific Services:**
 - Provides orientation to Home Care Attendant related to Assigned Tasks (Group/Client specific).
 - Provides consultation regarding Home Care Attendant Assigned Tasks (Group/Client specific).
 - Provides direction for tasks that do not meet the Home Care Assignment of Tasks to Home Care Attendant Policy requirement (CLI.5411.PL.008).
 - Facilitates coordination of client specific training visits including addressing training issues as they arise.
 - Develops, maintains and updates Home Care Attendant Task Plan documents (Group/Client specific).
 - Provides training and acts as a resource to Direct Service Nurses assigned to complete Home Care Attendant task training.
 - Ensures training and education of Home Care Attendant is current, reflects best practice and is shared with members of the Home Care Team.

- Responds to requests for Client Specific Training.
- Reviews and coordinates training for Home Care Attendants with the Resource Coordinator/Scheduler - Home Care Attendants.
- Enters assigned task training of Home Care Attendants into Procura Service Requirements under employee profile, scans the completed Home Care Assignment Task Training Record to the Resource Coordinator/Scheduler - Home Care Attendant and sends original record via interdepartmental mail.
- Conducts Home Care Attendant Ride Along Observation three months post skills training.
- **The Manager/Nursing Supervisor:**
 - Ensures that members of the Home Care team follow Home Care Assignment of Tasks to Home Care Attendant Policy.
 - Reviews and provides direction/approval for assigned tasks that exceed the approved Southern Health-Santé Sud Assigned Tasks List.
 - Acts as a liaison when discrepancies occur pertaining to assigned task training to assist in resolution.
- **After Hours:**
 - Provides ongoing support and guidance regarding assigned tasks to Home Care Attendant after regular work hours.
 - Reports issues or discrepancies to the Resource Coordinator/Case Coordinator as they arise.

SUPPORTING DOCUMENTS:

CLI.5411.PL.008.FORM.01	Home Care Assigned Task Training Request
CLI.5411.PL.008.FORM.02	Home Care Attendant Ride Along Observation
CLI.5411.PL.008.FORM.03	Home Care Assigned Task Monitoring Record
CLI.5411.PL.008.SD.01	Southern Health-Santé Sud Assigned Tasks List

REFERENCES:

WRHA Assignment Operational Directive 2018
 CRNM Practice Direction: Assignment and Delegation to Unregulated Care Providers May 2018
 V2020 Home Care Attendant/Home Support Worker Service Request
 CLI.5410.SG. 002.FORM.01 Nursing Service Request
[Assignment Task Plans and Training Records](#) – HPS/Programs and Services/Home Care