

SOP: Patient Handling and Transfer Techniques

This SOP describes **patient handling and transfer techniques**, focusing on safe and effective methods to move patients while minimizing risk of injury to both patients and healthcare providers. It covers proper body mechanics, use of assistive devices, communication strategies, and protocols for different types of transfers such as bed to chair, wheelchair to stretcher, and repositioning. The goal is to ensure patient comfort and safety, prevent falls and injuries, and promote efficient and respectful care during handling and transfers.

1. Purpose

To establish standardized procedures for patient handling and transfer to maximize safety, efficiency, and respect for patient dignity.

2. Scope

Applies to all healthcare personnel involved in direct patient care and movement within the facility.

3. Responsibilities

- All staff must follow safe patient handling techniques and this SOP.
- Supervisors are responsible for ensuring staff are trained and comply with guidelines.

4. Definitions

- **Transfer:** Moving a patient from one surface or position to another (e.g., bed to chair).
- **Assistive Devices:** Equipment used to facilitate safe transfers (e.g., slide sheets, transfer boards, mechanical lifts).
- **Body Mechanics:** The coordinated use of body parts to prevent injury and maximize efficiency.

5. Required Equipment

- Slide sheets / draw sheets
- Transfer boards
- Gait belts
- Mechanical lifts (if available)
- Wheelchair, stretcher, or commode chair (as required)

6. Procedure

6.1 General Principles

- Perform hand hygiene and explain procedure to the patient.
- Assess patient's physical ability, level of cooperation, and need for assistive devices or additional staff.
- Ensure the environment is safe and free from obstacles.
- Use proper body mechanics: keep back straight, bend at the knees, keep load close, and avoid twisting.
- Encourage patient participation as able.
- Utilize assistive devices as appropriate for the patient's mobility level.

6.2 Communication Strategies

- Clearly explain each step to the patient before proceeding.
- Use simple instructions and confirm patient understanding.
- Coordinate with team members using a “count of three” or agreed-upon signals.

6.3 Types of Transfers & Protocols

Transfer Type	Protocol
Bed to Chair	<ul style="list-style-type: none"> • Place chair close and lock wheels. • Position patient's feet flat on the floor, use gait belt if needed. • Assist patient to sitting position, then guide to stand and pivot, maintaining support. • Lower patient carefully into chair.
Wheelchair to Stretcher	<ul style="list-style-type: none"> • Position stretcher parallel to wheelchair, lock both. • Adjust heights to be level. • Use transfer board or slide sheet if appropriate. • Guide patient across with assistance, ensuring safety throughout.
Repositioning in Bed	<ul style="list-style-type: none"> • Explain procedure; adjust bed height as needed. • Use draw sheet/slide sheet under patient. • With team, grasp sheet close to body, use legs to slide patient up or to side on a coordinated count. • Reposition pillows and supports for comfort and safety.

6.4 Use of Mechanical Lifts (if needed)

- Assess suitability for lift use.
- Check equipment for safety/cleanliness.
- Place sling correctly under patient.
- Operate lift per manufacturer instructions, always with at least two staff present.

7. Documentation

- Document type of transfer, level of assistance, devices used, patient response, and any incidents or issues encountered.

8. Safety Considerations

- Do not attempt to move patients beyond your capability; ask for assistance if unsure.
- Report faulty equipment or hazards immediately.
- Always ensure privacy and respect patient dignity during transfers.

9. Training & Competency

- All relevant staff must undergo initial and periodic training on patient handling and transfer procedures.