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| **ONTARIO NURSES ASSOCIATION - HOMECARE**  **PROFESSIONAL RESPONSIBILITY WORKLOAD REPORT FORM** | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| **SECTION 1: GENERAL INFORMATION** | | | | | | | | | | | | | |
| Name(s) of Employee(s) Reporting (Please Print) | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| Employer:       Area of Assignment: | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| Date of Occurrence: | | Day | Month | | Year | Time: |  | | Hours of Work | | | |
|  | | | | | | | | | | | | | |
|  | | | | | | | | Date: | | Day | Month | Year | |
| Name of Supervisor/Manager: | | | |  | | | | Time notified: | |  | | | |
|  | | | | | | | | | | | | | |
| **SECTION 2: STAFFING** | | | | | | | | | | | | |
| |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | In order to effectively resolve workload issues, please provide details about the working conditions **at the time of occurrence** by providing the following information: | | | | | | | | | | Regular Staff #: | RN |  | | | Regular Staff #: | NP |  | | Actual Staff #: | RN |  | | | Actual Staff #: | NP |  | | Regular Staff #: | RPN |  | | |  |  |  | | Actual Staff #: | RPN |  | | |  |  |  | | Regular Clerical/IT Support:  Other: | |  | | | Actual Clerical/IT Support: |  |  | | Students: | Yes |  | No |  | How many? |  |  | | New/Novice Staff: | Yes |  | No |  | How many? |  |  | | Overtime: | Yes |  | No |  | If yes, how many? |  |  | | Agency Staff: | Yes |  | No |  |  |  |  | |  | | | | | | | | | | | | | | | | | | | | | | | | |

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| **SECTION 3: WORKING CONDITIONS** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **At the time of the occurrence, the planned workload was:** | **# Planned** | **# Actual** | **Time Planned** | **Actual Time** |
| Clinics |  |  |  |  |
| Home Visits/School Visits/Shift Visits |  |  |  |  |
| Conferences/meetings etc. |  |  |  |  |
| Documentation/administration |  |  |  |  |
| New Patient Assessment |  |  |  |  |
| Treatment(s) |  |  |  |  |
| In-service/Education |  |  |  |  |
| Travel (# of trips) |  |  |  |  |
| Weather |  |  |  |  |
| Travel/Distance |  |  |  |  |
| Other (e.g. Health Promotion Classes, etc.) |  |  |  |  |

If there was a shortage of staff at the time of the occurrence, (including support staff) please check one or all of the following that apply:

Absence/Emergency Leave  Sick Call(s)  Vacancies

Supervisor/Management Support available on site? Yes  No

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **SECTION 4: PATIENT/CLIENT CARE FACTORS CONTRIBUTING TO THE OCCURRENCE** | | | | | | | | | |
| |  | | --- | | Please check off the factor(s) you believe contributed to the workload issue and provide details:  Change in client acuity/complexity (psychological/physical/social). Please specify: | | Consultation with MD/LHIN/Delay  Overflow from previous shift | | Visitor/Family member  Client census at time of occurrence  # of Admissions  # of Discharges  Weather  Travel/Distance  Advanced scope of practice/client advocacy | | Abnormal diagnosis/laboratory follow-up:       (#)  Documentation  Reporting  Safety in Jeopardy (please specify)  Language barriers  Consultation by       (telephone/onsite/etc.)  Unanticipated clients/uncontrolled variables. Please specify:    Lack of/malfunctioning equipment/supplies. Please specify:    Incomplete referral Information  Illegible orders | | Non-nursing/administrative duties. Please specify: | | Emails | | Phone Calls/Voicemails  Technology (e.g. no cell phone service/internet connection) Please Specify:  Allotted time of visit | | Other: (e.g. Student supervision, staff orientation, mentorship, etc.) Please specify: | | | | | | | | | | |
|  | | | | | | | | | |
| **SECTION 5: DETAILS OF OCCURRENCE** | | | | | | | | | |
| |  | | --- | | Provide a concise summary of the occurrence and how the occurrence affected your practice workload: | | | | | | | | | | |
| **SECTION 6: PRACTICE STANDARDS AND GUIDELINES/POLICIES AT RISK** | | | | | | | | | |
| Code of Conduct  Working with Unregulated Care Providers  Confidentiality and Privacy: Personal Health Information  Telepractice  Scope of Practice  Documentation  Therapeutic Nurse Client Relationship  Employer policy – Specify       (include policy if able)  Nurse Practitioner  Agency  Other   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Provide/identify the CNO standard(s)/practice guidelines, including the Nurse Practitioner Practice Standard, or organization/employer policies that are believed to be at risk: | | | | | | | | Is this an: Isolated incident? | |  | Ongoing problem? |  | (Check one) | | |  | | | | | | | | | | | | | | |
| **SECTION 7: REMEDY** | | | | | | | | | |
| (A) At the time the workload issue occurred, did you discuss the issue within the team/manager/supervisor.  Yes  No  Provide details: | | | | | | | | | |
| Was it Resolved? Yes  No | | | | | | | | | |
| (B) Failing resolution at the time of the occurrence, did you seek assistance from the person designated by the employer as having responsibility for timely resolution of workload issues? Yes  No  Please provide discussion details including name of individual(s): | | | | | | | | | |
|  | | | | | | | | | |
| Was it resolved? Yes  No  (C) Did you discuss the issue with your manager/supervisor (or designate) on her or his next working day?  Yes  No  Please provide details:  Was isolated incident resolved? Yes  No  If an ongoing issue, was the complete issue resolved? Yes  No  Were measures implemented to prevent a re-occurrence? Yes  No  Please provide details:    If staff made available, please identify the number of staff provided, their category and the amount of time they were available for:   |  |  |  | | --- | --- | --- | | **Category**  **(CM, RN, RPN,PHN,PSW, Clerk, etc)** | **Amount of time staff**  **Available** | **Orientation to Branch Requires**  **Yes  No**  **Staff Orientation time (min/hrs)** | |  |  |  | |  |  |  | | | | | | | | | | | |
|  | | | | | | | | | |
| **SECTION 8: RECOMMENDATIONS** | | | | | | | | | |
| Please check-off one or all of the areas below you believe should be addressed in order to prevent similar occurrences:  In-service  Review **RN** patient ratio  Increase RNStaffing  Review Policies & Procedures  Increase supportStaffing  Change Start/Stop times of shift(s). Please specify:  Caseload review for acuity/activity  Flexibility with appointments and scheduling  Replace sick calls, vacation, paid holidays, other absences  Perform Workload Measurement Audit  Change Physical Layout  Orientation  Float/casual pool  Equipment. Please specify:        Other: | | | | | | | | | |
|  | | | | | | | | | |
| **SECTION 9: EMPLOYEE SIGNATURES** | | | | | | | | | |
| Signature: |  | | | Phone # / Personal E-mail: | |  | | |
| Signature: |  | | | Phone # / Personal E-mail: | |  | | |
|  | | | | | | | | | |
| **SECTION 10: MANAGEMENT COMMENTS** | | | | | | | | | |
| Please provide any information/comments in response to this report, including any actions taken to remedy the situation, where applicable. | | | | | | | | | |
|  | | | | | | | | | |
| Management Signature: | |  | | | | | Date: | Click here to enter a date. | |
| Date response to the employee: | | | Click here to enter a date. | | Date response to the union: | | | Click here to enter a date. | |
|  | | | | | | | | | |
| Copies: (1) Manager/Chief Nursing Officer (or designate) (2) ONA Representative (3) NP (4) LRO | | | | | | | | | |

### ONA HOMECARE PROFESSIONAL RESPONSIBILITY WORKLOAD REPORT FORM

### GUIDELINES AND TIPS ON ITS USE

The parties agree that client care is enhanced if concerns relating to professional practice are resolved in a timely and effective manner. The parties will utilize a problem-solving process focusing on collaborative solutions at the earliest opportunity. This report form provides a tool for documentation to facilitate discussion and to promote a problem solving approach. ONA may use this information for statistical purposes and noting trends across the province.

**THE FOLLOWING IS A SUMMARY OF THE PROBLEM SOLVING PROCESS. PRIOR TO SUBMITTING THE WORKLOAD REPORT FORM, PLEASE FOLLOW ALL STEPS AS OUTLINED IN THE CNO STANDARDS AND/OR APPLICABLE COLLECTIVE AGREEMENTS.**

##### PROBLEM SOLVING PROCESS

1) At the time the workload issue occurs, discuss the matter within the program to develop strategies to meet client care needs using current resources. If necessary, using established lines of communication, seek immediate assistance from an individual identified by the Employer (e.g. co-ordinator/supervisor) who has responsibility for timely resolution of workload issues.

2) Failing resolution of the workload issue at the time of the occurrence,discuss the issue with your Executive Director/Administrator or Manager (or designate) on his or her next working day.

3) If no satisfactory resolution is reached during steps (1) and (2) above, then you may submit a Professional Responsibility Workload Report Form to the Union-Employer Committee within the specified number of days of the alleged improper assignment.

4) The Union-Employer Committee shall hear and attempt to resolve the complaint to the satisfaction of both parties.

5) If the issue is not resolved at the meeting in (4) above, the LRO shall attend a meeting with Management and attempt to resolve the complaint. Failing resolution, the LRO will request a Professional Practice Specialist to attend a follow up meeting.

6) If outlined in your Collective Agreement, the form may be forwarded to an Independent Assessment Committee within the requisite number of days of the meeting in (5) above, if outlined in your collective agreement.

7) The Union and the Employer may mutually agree to extend the time limits for referral of the complaint at any stage of the complaint procedure. The Union and the Employer may mutually agree to extend the time limits for referral of the complaint at any stage of the complaint procedure.

##### TIPS FOR COMPLETING THE FORM

1) Review the form before completing it so you have an idea of what kind of information is required.

2) Print legibly and firmly as you are making multiple copies.

3) Use complete words as much as possible. Avoid abbreviations.

4) You should report only facts about which you have first-hand knowledge. If you use second-hand or hearsay information, identify the source if permission is granted.

5) Identify the CNO RN standards/practice/guidelines/policies and procedures you believe to be at risk. College of Nurses Standards can be found at [www.cno.org](http://www.cno.org).

6) Do not, under any circumstances, identify clients/patients/residents.