

Clinical Assistant: Delegation Policy

Delegation: the transfer of responsibility for the performance of an activity from one person to another, with the original person retaining accountability for the outcome (adapted from Guideline: delegation of care by a registered nurse to a health care assistant May 2011)

Requesting clinician: the clinician who ordered the test, or the clinician who is responsible for the patient as their enrolled provider, and therefore receiving results such as recall blood tests, hospital letters etc.

Supervision:

The clinical assistant must have a supervisor within the practice. This supervisor should be a vocationally registered general practitioner. The supervisor is responsible for providing ongoing support and supervision to the clinical assistant. This could take the form of a regular meeting, participation in peer review group, written communication such as tasks with questions from the clinical assistant to the supervisor. audit of random selection of patient records for which the clinical assistant has processed inbox records under the delegation framework.

The supervisor of the clinical assistant must be clearly outlined during the orientation process and the process by which supervision will occur must be defined and understood by both the supervisor and the clinical assistant.

The supervisor must ensure that the clinical assistant who has been delegated the activity:

1. Understands the delegated activity
2. Has received training in the delegated activity and that this has been recorded
3. Knows when to escalate a result to a duty clinician and the process for how to do this
4. Knows that if a result is not able to be managed in the delegation framework, then it is to be left in the inbox for review by the requesting clinician
5. That the clinical assistant understands they should not file any inbox result unless this is both allowed within the delegation framework, and the clinical notes associated with the result include documentation that makes it clear there is no follow up required of normal results.

Escalation protocol:

The process for escalation for results that are deemed to need same day review under the delegation framework must be clearly documented and should be understood by both the full clinical team at the practice employing the clinical assistant as well as the clinical assistant.

Monitoring and Evaluation:

Once per week, a minimum of five patient records for which the clinical assistant has processed results, should be audited by the supervisor to ensure the clinical assistant has applied the delegation framework correctly. Any instances in which it has been applied incorrectly need to be addressed with further training and additional supervision and this should be documented by the supervisor so that the actions taken are clearly understood.

Responsibility of the clinical assistant:

1. The clinical assistant performing the delegated activity is accountable for their own actions
2. The clinical assistant must inform their supervisor if they have not been trained to action information in the delegation framework
3. If the clinical assistant does not understand how to apply the delegation framework to a result, or consider that it sits outside the delegation framework, they must leave that result in the inbox to be reviewed by a requesting clinician.
4. The clinical assistant should not file any inbox result unless this is both allowed within the delegation framework, and the clinical notes associated with the result include documentation that there is no follow up required of normal results.
5. The clinical assistant must follow the escalation protocol when this has been deemed the next step within the protocol, and if for some reason the duty clinician is unavailable, they must seek same day guidance from a senior member of the practice such as the nurse team leader or practice manager

The employer of the clinical assistant must:

- Ensure that the practice has a documented escalation protocol that enables the clinical assistant to hand over results within the same working day when deemed appropriate by the delegation framework
- Ensure the clinical team at the practice is aware of the escalation framework and their responsibilities within this
- Ensure there is a named supervisor within the practice for the clinical assistant who is available on a regular basis to provide support, training, and advice
- Ensure the supervisor has time available to audit a minimum of 5 records per week where the clinical assistant has processed results under the delegation framework
- Ensure the clinical assistant has completed training in use of the delegation framework before being expected to begin undertaking their role.
- Ensure the clinical assistant has a position description and understands their delegated activities.

This document is adapted from the Delegation of care by a registered nurse to a health care assistant, Nursing Council of New Zealand. May 2011.