

Title of WI: Transfer and Discharge of Customers

Custodian: Group Managing Director

Version Number: 02

Issue date: 19.08.2025

Review date: 19.08.2028

WORK INSTRUCTION (WI)

Title of WI	Transfer and Discharge of Customers		
What type of document is this?	Work instruction	WI Reference Number	HHH-W.I-059
Purpose of WI	<p>This work instruction has been implemented to ensure the safe transfer/discharge of customers between services for the purpose of conforming with required Regulatory standards. This work instruction also considers the following:</p> <ul style="list-style-type: none"> • Regulation 9: Person centred care, requires service providers to ensure that the care and treatment of service users must be appropriate, must meet their needs and must reflect their preferences. • Regulation 12: Safe Care and Treatment, includes a requirement for service providers to ensure that care and treatment is provided in a safe way for service users, including where responsibility for the care and treatment of service users is shared with, or transferred to, other persons, working with such other person, service users and other appropriate persons to ensure that timely care planning takes place to ensure the health, safety, and welfare of the service users. • Reducing any levels of anxiety that the customer may have regarding the transfer/discharge. • Ensuring that the customer's needs, and wishes are fully considered. • The objective of this work instruction is to manage and reduce the risks of customer transfer/discharge and so reduce the incidence of serious incidents occurring during transfers. 		

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	<ul style="list-style-type: none"> This document represents guidance for most scenarios but there will be individual clinical situations requiring a different approach from those specified below. Where this is felt to be the case, deviations from the recommendations should be made only in conjunction with the customer, the Regional Clinical Lead for clinical customers and other healthcare professionals involved in the transfer/discharge. However, in general, the purpose of this document is to: <ul style="list-style-type: none"> Support branch and carers in ensuring the safe transfer/discharge of customers, promoting best person-centred care on every occasion. Provide a standard, companywide procedure for employees outlining a clear course of action for supporting with the transferring/discharge of customers from their home. Ensure that customers are transferred safely by employees who are competent to provide the care they need during the transfer/discharge. Provide guidance on the level of competence required for employees to enable safe and effective support for the customers appropriate to the health and safety requirements of the customer.
Role	Responsibility
Head of Quality	The Head of Quality has overall accountability for ensuring that Helping Hands meets its statutory and non-statutory obligations in respect of maintaining appropriate standards of customer transfer/discharge.

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	<p>Appropriate policies and procedures are developed, maintained, and communicated throughout the organisation</p> <p>The Head of Quality devolves the responsibility for monitoring and compliance to the Care Managers, Quality Business Partners, Divisional Directors and Area Care Managers.</p>
Divisional Directors and Area Care Managers	To ensure Helping Hands employees uphold the principles of correct customer transfer in line with this work instruction
Care Managers	<p>Safe transfer/discharge methods are communicated and implemented within their areas of responsibility.</p> <p>Any incident arising from the transfer/discharge of a customer should be reported and investigated at an appropriate level and any actions required are taken to prevent reoccurrence and minimise risk.</p>
Quality Business Partners	<p>Monitoring that the process is being followed in accordance with this work instruction</p> <p>Escalate all areas of concern to the Care Manager</p>
Regional Clinical Lead	<p>To support with advice where required with the transfer/discharge of any customer with complex clinical needs.</p> <p>To ensure reassessment of customer with clinical needs/new clinical needs and decide if Helping Hands can meet the new needs prior hospital discharge.</p> <p>Undertake a managed return to home for clinical customers on discharge.</p> <p>Undertake any new clinical training needs of employees.</p> <p>Update clinical support plan.</p>

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Scope of WI	The scope of this work instruction is companywide. This work instruction is to be adhered to for any customer who requires transfer/discharge, to an alternative location. It includes all customers who are transferred/discharged for whatever reason and at any time of day or night. The work instruction should be adhered to by all care and administrative employees.
<p>1.0 Introduction</p> <ul style="list-style-type: none"> 1.1 Helping Hands recognises that the transfer/discharge of customers is associated with increased safety and security risks. 1.2 It is also recognised that the safe transfer/discharge of customers, whether from home to hospital, respite units or any other living facility, requires a systematic approach to reduce risk. 1.3 Risk reduction strategies include promoting good practice in all the following areas: <ul style="list-style-type: none"> 1.3.1 balancing need for transfer against inherent risks and avoiding transfer wherever possible 1.3.2 assessment of customers prior to any transfer/discharge 1.3.3 planning and communication of agreed plans to those involved in transferring/discharging or receiving customers 1.3.4 documentation. <p>2.0 Planned Transfers/Discharges</p> <ul style="list-style-type: none"> 2.1 Planned transfers to hospital are made to address needs for medical procedures and treatment on an inpatient basis. Helping Hands will follow the process that applies to anyone receiving health service treatment. Helping Hands will work closely with GP and hospital services to make sure that the person receives their treatment efficiently and effectively by making sure that all required information concerning the person's care needs and medication is passed to the relevant people and that all consent issues have been addressed, including where the person might lack the mental capacity to give their informed consent to the proposed treatment. 	

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- 2.2 Before a person's admission to hospital, employees will prepare and support the person for their transfer as needed. Helping Hands employees will work closely with relatives and others involved to resolve any concerns.
- 2.3 On the day of transfer the employee will make sure that there is someone to accompany the customer to the hospital (if risk assessed as required) to make sure that the admission is achieved smoothly. This will have been discussed in advance and decided who will accompany them, such as relatives, friends, or employee. The appropriate means of transport will also be arranged in advance.
- 2.4 Once the customer has been admitted to hospital Helping Hands Branch employees will continue to communicate with the hospital and relatives regarding their wellbeing. This should be recorded in the customers notes.
- 2.5 If Helping Hands care is not needed whilst the customer is in hospital, branch employees are to pause care and ensure that billing reflects this pause in care

3.0 Unplanned and Emergency Admissions

- 3.1 Where a customer must be transferred to hospital in an emergency, Helping Hands will proceed to follow the principles and procedures that apply to planned transfers/discharges:
- 3.1.1 Make sure that the customers dignity is retained throughout the process e.g., wearing appropriate clothing and keeping them informed of the events that are taking place.
- 3.1.2 Ensure that the customers consent has been obtained or where they are unable to give their consent that the transfer is taking place in their best interests
- 3.1.3 Work closely and co-operatively with healthcare professionals so that they have the information they need e.g., the customers condition, plan of care including any preferred routines and advance care plans. Communication and accessibility need, current medications, triggers to behavioural issues, family, including carers and next of kin. Complete Helping Hands completed Transfer form in a timely manner.

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3.1.4 Ensure (if required) that the customer is accompanied by a suitable person who can act as their representative and provide support.

3.1.5 Ensure that any health and safety issues are addressed according to the specific situation.

3.1.6 Inform those who need to know about the transfer as soon as possible such as next of kin and line manager in Helping Hands.

3.1.7 Inform the Regional Clinical Lead of a clinical customers admission.

4.0 In Hospital

4.1 Helping Hands employees can continue to support the customer as appropriate depending on individual needs and circumstances.

4.2 This may include visiting/sending a get-well card (if appropriate) and keeping in contact with relatives and friends and checking on their progress with hospital employees.

4.3 Relevant information will be recorded to help with the care planning and continuity of care and treatment required on their discharge from hospital.

4.4 Liaise with the Regional Clinical Team if the customer is a clinical customer. If there are new clinical needs liaise with the Regional Clinical Lead so that an assessment with the customer prior to discharge can be completed, to ensure Helping Hands can still meet the customers' needs and plan a managed discharge for the customers safety. A home visit may be required prior to discharge to reassess the environment and check that any new equipment is in place and risk assessment updated and training provided if needed.

4.5 Helping Hands employees to maintain weekly contact with the customer, Next of Kin, or hospital employees to monitor discharge progress and ensure care arrangements are in place for a smooth transition upon discharge.

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5.0 Procedures for Discharge from Hospital and After Care

- 5.1 When a customer returns from hospital to home ensure they are transported safely and in a dignified way with appropriate escorts and assistance provided according to individual circumstances.
- 5.2 Support for the discharge must be considered for what needs to be organised and who will do this. E.g., food available and heating switched on in the home, also any new equipment required has been delivered to the home and ready for use and has been risk assessed and added to the care plan and that any training required has been given to employees to use new equipment.
- 5.3 Welcome the customer back into the prepared and organised home to enable the customer to settle back quickly without experiencing undue stress.
- 5.4 Communicate with healthcare professionals to ensure continuity of care and treatment, convalescence, and rehabilitation after care needs. E.g., District Nurse, Occupational Therapist and GP.
- 5.5 Review medication with the discharge plan to ensure any changes to medication are relayed to Branch Care Manager to update e-Medication Administration Record.
- 5.6 Review the support plan to ensure it is updated with admission and any changes to care needs are addressed.
- 5.7 If the customer has clinical needs either before or after transfer/discharge you must liaise with the Regional Clinical Lead to update the clinical support plan.
- 5.8 If the customer has End of Life care needs sensitive discussions with the customer and or next of kin should be undertaken. The support plan should be updated. Helping Hands employees should seek support from the Regional Clinical Lead and ask for further end of life training if required.

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6.0 Planning for Customers who Experience Repeated Admissions

- 6.1 Do discuss with customers with capacity and those acting in best interests, planning tools as described below.
- 6.2 For customers with repeated admissions consideration should be made to use The Red bag scheme, which is one example of ensuring the customer takes and brings back everything they need. Use this in conjunction with the HHH-F141 *Helping Hands Transfer of Care form*- available on collaborate. The Red bag might include personal belongings, medication, 'This is me', current care plan, discharge summary, Herbert protocol, Advance Care Plan for resuscitation, Health Action Plan, DNAR and ReSPECT forms.
- 6.3 For customers with Dementia do consider using the Herbert Protocol which is a national scheme to help the Police with missing customers living with Dementia.
- 6.4 For all customers consider use of the Lions message in a bottle free scheme, where information is stored in the bottle in the fridge and is a recognised scheme for healthcare professionals for information regarding the customer most useful in emergency situations.

TRAINING

Is training required?

N/A

COMPLIANCE

How is compliance with this document going to be monitored?

Keep document up to date to ensure it is in line with relevant national guidelines

Most up to date document to be accessible on collaborate for all employees

PROCEDURAL INFORMATION

Changes since previous version

- Update to job titles, roles and terminology
- Reference to end-of-life training
- Reference to staying in contact during admission
- Added to new W.I template

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Who was involved in developing /reviewing/amending the document? (list titles)	Clinical Manager	
How confidential is this document	Restricted	Can be shared freely within Helping Hands but NOT outside
References	<p>Health and Social Care Act 2008 (Regulated Activities) Regulations 2014.</p> <p>Nice guidelines quick guide moving between hospital and homes 01 December 2015.</p> <p>NICE Hospital Transfer Pathway (Red Bag Pathway) March 2016.</p> <p>The Herbert Protocol, westyorkshire.police.uk/Herbert-protocol</p> <p>Resuscitation Council UK ReSPECT (Recommended Summary Plan for Emergency Care and Treatment) version 3, 15 September 2020.</p> <p>This is me – Alzheimer’s Society 2021 revised edition.</p> <p>www.lions.org.uk message in a bottle s</p> <p>Safe Transfer of Care form on collaborate– to be completed by Helping Hands representative.</p>	
Associated Documents	HHH-F141 Transfer of Care Form	

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