

SUN LOCAL ESCALATION REFERRAL CHECKLIST

- ❖ Complete all sections of this form.
- ❖ Collect applicable information before submitting it to your NPO.
- ❖ Retain copies of all supporting information and/or documentation for your Local files.
- ❖ Do not retain or send patient identifiable information with your submission.
- ❖ Following review by your NPO, a meeting will be scheduled to proceed with escalation.

Date of Referral: _____ **Referred By:** _____

Referral to Nurse Practice Officer (NPO):

- Barb Abele, RN BScN (Saskatoon)
- Lynn Schmidt, RN BSN (Saskatoon)
- Dana Lamers, RN BScN (Regina)
- Carrie Simpson, RN BScN (Saskatoon)
- Alison Nachtegaele, RN BScN (Regina)
- _____

BACKGROUND INFORMATION

Employer: _____ Facility: _____
 Local Name: _____ Local ID#: _____
 Unit(s): _____
 Unit Manager(s): _____ Director: _____

 Local President: _____ NAC Chair(s): _____

SUN Board of Directors Representative: _____

Name of Unit Representatives Participating in Submission & Presentation:

Unit Rep #1: _____ Unit Rep #2: _____
 Email: _____ Email: _____
 Telephone: _____ Telephone: _____

WORK SITUATION REPORT (WSR) ESCALATION VERIFICATION

Have the WSR(s) been reviewed and/or discussed with your NPO?

- Yes Date: _____
- No *Please contact your NPO*

Has the Local President been advised of the intended WSR escalation?

- Yes Date: _____
- No *Please contact your Local President*

Have all WSRs been presented/discussed at a minimum of two Joint NAC Meetings?

- Yes WSR Date Range: _____
- No *Please contact your NPO to discuss next steps*

Have you created an initial SBAR Report?

- Yes *Begin collecting actionable items for submission listed below.*
- No *Please contact your NPO*

LOCAL ACTIONABLE ITEMS FOR SUBMISSION

- Draft SBAR Report
- Copy of WSRs
- Copy of WSR Investigation Forms *(if applicable)*
- Joint NAC Minutes & Supporting Documentation
- Action Plans & Outcomes
- Copy of Local Emails/Communication/Information
- Relevant Employer Policies/Procedures/Work Standards
- Master Schedules/Rotations (past/current/proposed)
- Witness Investigation Interview Notes *(if applicable)*
- Professional/Regulatory Communication
- Professional Association Position Statements/Standards/Best Practices *(if applicable)*
- Copy of Incident Reporting Forms (de-identified) *(if applicable)*
- Acuity Measurement Tool(s), Reports, Outcomes
- Other Information/Supporting Documentation *(please specify)*
 - _____
 - _____
 - _____
 - _____

DATA & STATISTICS

❖ *This information may have been provided or obtained as a part of the review, analysis, or evaluation to find solutions at the Local or Joint NAC meeting(s).*

- Census/Capacity Data
- Admission/Discharge Data
- Readmission/Length of Stay
- Unit Performance/Outcomes Measures
- Occurrence Report Summaries (*i.e.: falls, medication, incidents*)
- Vacancies
- Junior/Senior Skill Mix
- Churn
- Sick Time Usage
- Overtime
- Unit/Network Level Data Collection (*please specify*)
 - _____
 - _____
 - _____
 - _____
- Other Data/Statistics (*please specify*)
 - _____
 - _____
 - _____
 - _____