

# Instructions for Personnel Record Review for Delegation

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**Purpose:** The Personnel Record Review for Delegation Tool was designed to consolidate information related to multiple Unlicensed Assistive Personnel in one place for ease of review and updates.

**Key Points:** The current RN in the facility is responsible for the act of delegation of nursing services. When the RN position is vacated by one nurse and filled with a new nurse, the process of delegation must be repeated for the entire staff of UAP's.

## Instructions:

### Complete the top section following the completion of Delegation Process

1. Add the name of the Registered Nurse to the top of the form
2. Add the date of the completion of full Personnel Record Review ( following the new nurse completing the delegation process) to the top of the form

### Pre-Delegation Information Gathered from Personnel Records (The RN must verify that UAPs are eligible to receive delegation through the documentation of this information)

3. List the names of the Unlicensed Assistive Personnel in the left hand column
4. List their dates of hire obtained from the personnel file
5. List the date of their Assistance With Medication course from the AWM Card in their personnel file
6. List the date of completion of their 16 hours of orientation

### Following the Delegation Training, Monitoring and Delegation Process, complete the next 4 columns

7. List the date the UAP attended the Delegation Training Session
8. List the date of the Pre-Test and Skill Verification
9. List dates nurse monitored UAP completing tasks
10. List the date UAP was delegated to Assist With Medications by the current RN

### Ongoing Documentation (leave section open for nurse to document in the future)

11. List dates of Supervisory Visits
12. List date that delegation was rescinded by nurse

## Maintenance of Form

It is recommended that the RN request assistance from the person in charge of maintaining employee files to obtain the information for the first four columns. The RN or assistant can update form as needed. Be sure to add supervision visits and rescission of delegation, as necessary.

Copies of the completed form should be maintained by the RN as well as in the location of all delegation related documents (accessible for Administrator, RN and authorized agency review).