

To Lift or Not to Lift: A case of communication gone wrong

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Background about the Organization:

Travel and Go is a company that has been in the industry for over 20 years dealing mainly with transportation. Travel and Go focuses largely on patient transfers in terms of providing a mode of transportation for non-emergency patients from the hospital, nursing/senior homes, recreation centers, homes, and more. Travel and Go also expanded its business by providing customs services for transportation, fleets, charters, schools, and door-to-door services.

The company composes of many employees from its management team responsible for providing proper and functional equipment. Along with this they approve, bring forth and maintain policies to help keep employees safe all while overlooking that the health and safety department is adequately doing its job. This brings me to the next set of employees the company consists of members of the HR team which include recruitment specialists and members of the health and safety department. The day-to-day activities of such a person include handling records of patient transfers, addressing health and safety concerns, overlooking investigations of incidents, and claims. These are just some activities these personnel complete on a regular day of work but are not limited to these activities. The company also composes of many attendants, medics, and drivers for its large fleet of transportation vehicles.

The company is not only operated on an individual basis but also deals with brokers/individual contractors. Hence, Travel and Go takes extra precautionary measures in training not only its own employees but, also the individual contractors' employees. Travel and Go takes great pride when it comes to health and safety as it deals with the public a lot on a daily basis. A lot of requirements are set in place in following protocols and this is ensured through the numerous training classes mandated to each employee before they start working. An example of such training includes how to do heavy lifting without causing injury to yourself or anyone else.

Description of the incident:

Billy just got hired at Travel and Go and is at the company for his first day of orientation and training. The company goes over the numerous training classes they have planned for the

new hires to complete over the span of the upcoming days. The company emphasizes the importance of safety in the workplace and explains how incidents could directly involve an employee or a patient for long-term and short-term injuries.

Over the next couple of days, Billy goes through training about how to lift properly without straining his back, avoiding injury for both him and the patient, equipment training to ensure the functionality of equipment, CPR and first responders training. Along with all these Billy learned preventative measures to avoid incidents through protocols designed by the company. Billy was told if a task is too big for him to complete alone to ask for backup and if a task is dangerous (out of hand situations) to immediately notify authorities, Security (if on location), or the company's team to take control. Billy was familiarized with company policy regarding incidents and how lawsuits, claims, and patient injuries are involved.

Billy completed his training and went ahead to do his job transferring patients. Although he was hesitant his first day at the job went well. The next day, Billy came into work showing a lot of enthusiasm and confidence. A call was dispatched for Billy and a co-worker to transport an elderly lady from the hospital to the nursing home. On the scene, Billy met with a representative from the hospital to clear all documents of the patient for discharge. He and his co-worker secured the woman onto a stretcher as she just underwent surgery and was under the influence of anesthesia. Billy rolled the stretcher over to the transferring van and proceeded to get into the van lifting the stretcher into the van with him while his co-worker lifted the stretcher from outside the van. All seemed to be going well until the hospital contacted dispatch and told the supervisor the patient Billy was responsible for transferring was dropped and hurt their hip along with fracturing a bone in their body.

An investigation was opened immediately by Cara a recruitment specialist who also works in the health and safety department. This investigation consisted of a series of interviews with Billy, his co-worker, the hospital, and the patient. The specialist decided to hear all aspects of the story from people present on the scene and as employees are not unionized, they do not have a spokesperson that has voiced the criteria for such cases hence, the consequences and final say are in the company's hands.

Cara started off the interview by contacting the hospital as they were the first to inform them about the incident. The representative that met Billy was the one to call the company and

inform them. When questioned by Cara he said, “I had just gone inside the entrance of the hospital after handing Ms. Johnson over to Billy and after 2 minutes when I went to go meet another attendant outside, I saw Ms. Johnson on the ground and her stretcher sideways while Billy and his co-worker, John, were trying to get Ms. Johnson up and lift the stretcher upright. The hospital staff was alerted as Ms. Johnson was screaming in pain and doctors concluded that Ms. Johnson fractured her bone and hurt her hip.” After, hearing the representative’s side of the story Cara decided to approach Ms. Johnson.

Cara asked Ms. Johnson if she remembers anything about the incident as she was still showing the effects of anesthesia “I remember very faintly what happened” said, Ms. Johnson “One minute I was on the stretcher half into the van and the second I was on the ground of my stretcher in a lot of pain” she explained, with tears in her eyes. Cara confused as to how this happened comes in contact with both attendants who were off their job at the time of the investigation.

Cara questioned Billy as to how Ms. Johnson fell off the stretcher to which Billy responded, “I brought her [Ms. Johnson] over to the van and assumed John secured her straps.” Cara then asked as to how the stretcher became unstable and fell to which Billy replied, “I came into the van with the stretcher and couldn’t see whether John had gotten the rest into the van so, I asked him should I let go to which he said what sounded to be as a go.” Cara asked the same questions to John to which he said, “I thought Billy secured Ms. Johnson in before getting into the van and then he asked me should I let go to which I responded no but, there was an ambulance passing and Billy didn’t hear me properly.” Everything was clearer to Cara now that this was a case of miscommunication.

Cara discussed the details of this case with her supervisor while recognizing the severity of this case. Management was very concerned as to how an employee that went through training 2 days prior forgot steps in ensuring the prevention of such an incident. Moreover, the name of the company was tarnished at the hospital that partnered with the company to transport patients. Along with this, there is a concern about a lawsuit against the injuries Ms. Johnson sustained. Cara realizes additional training must be implemented for all employees but also discusses with management their motto about preventing/resolving an issue or not going through that event again to make sure it won’t reoccur. Management is still discussing the implications of this case

as no concrete conclusion has been reached apart from reinstating additional training. Billy and John are on temporary suspension until the investigation is done to ensure more incidents do not occur. Concerns about implementing better training are of utmost priority for the company but, coming to a conclusion for the fault of the incident is still unresolved and under investigation due to multiple factors causing this incident.

Discussion Questions:

1. How can the company effectively implement additional training that is different from the initial training to be more effective as Billy just received training but still made a mistake?
2. Cara decided to take all sides of the story but what should the company do to ensure employees are protected and heard as they are not unionized for such situations?
3. What do think the company lacked in its initial training? To reiterate, the company focused more on lifting techniques, but the incident occurred due to miscommunication.
4. What do you think Cara needs to implement in her investigation as she was not able to come to a conclusion about the fault and actions that need to be taken for the incident?
5. What are some preventative measures to ensure the safety of employees and patients in such a situation?
6. What steps can be taken to prevent and solve an incident that was out of anyone's control?
7. How could have something like the pandemic affected the quality of training and what steps could the company take to ensure the same level of quality?

Appendices:

Invitation:

Hello,

My name is Watan Gill. I am an Undergraduate student at York University pursuing a Human Resources Certificate.

For my Occupational Health & Safety Course, I Would like to engage in an interview with you regarding any health and safety challenges faced in your organization. This would greatly aid in helping us understand how real-life health and safety challenges are in organizations. I am going to be using your answers and the understanding of your organization to develop a case study.

This case study will be shared amongst educators across the world while keeping the identity of your organization a secret and writing the case study on a fictitious organization. The interview should not go over 20 minutes. Please help support our learning by allotting 20 minutes of your time to this interview.

Thank you,

Watan Gill

Interview Questions:

1. Can we Start off with getting to know you and a bit about yourself?
2. What kind of organization do you work for right now?
3. What does your organization do?
4. How long have you been a part of this organization?
5. Can you explain your day-to-day activities at your organization?
6. Can you tell us about significant health and safety related challenge that you have been facing or a challenge the company has been investigated?
7. Could you talk about the management role in aiding with challenges?
8. Can you tell me about employee's responsibilities and challenges they face?
9. Do you think any problems associated with this there could easier solutions or more difficult solutions?

10. Could you tell me about a specific situation/incident that occurred? Your tasks during that incident? Were actions taken? What results from the actions and how it was solved?
11. Do you think there are certain situations that happen that cannot be resolved or not resolved as easily?
12. Is there any sort of actions taken to ensure employees safety?
13. Are there any preventative measures taken in employees training?
14. Are your employees unionized?
15. Do you think if they were part of a union it would be better for the employee compared to the situation right now?

Already submitted as separate documents previously:

Consent

Interview Recording

TCPS Certificate