Appendix B National Council of State Boards of Nursing
Decision Tree for Delegation to Nursing Assistive Personnel

Step One – Assessment and Planning

Are there laws and rules in place that support the delegation?  NO

Is the task within the scope of the delegating nurse?  NO

Has there been assessment of the client needs?  NO

Is the delegating nurse competent to make delegation decisions?  NO

Is the task consistent with the recommended criteria for delegation to nursing assistive personnel (NAP)?
Must meet all the following criteria:
• Is within the NAP range of functions
• Frequent recurrence in the daily care of a client or group of clients;
• Is performed according to an established sequence of steps;
• Involves little or no modification from one client-care situation to another;
• May be performed with a predictable outcome;
• Does not inherently involve ongoing assessment, interpretation, or decision-making which cannot be logically separated from the procedure(s) itself; and
• Does not endanger a client’s life or well-being

Does the nursing assistive personnel have the appropriate knowledge, skills and abilities (KSA) to accept the delegation?  NO

Does the ability of the NAP match the care needs of the client?  YES

If not in the licensed nurse’s scope of practice, then cannot delegate to the nursing assistive personnel (NAP).
Authority to delegate varies; so licensed nurses must check the jurisdiction’s statutes and regulations.

Do not delegate

Assess client needs and then proceed to a consideration of delegation

Do not delegate until can provide and document additional education, then reconsider delegation; otherwise do not delegate

Do not delegate

Do not delegate until evidence of education and validation of competency available, then reconsider delegations; otherwise do not delegate

Do not delegate

Yes
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Are there agency policies, procedures and/or protocols in place for this task/activity?

YES → Proceed with delegation*

NO

Is appropriate supervision available?

YES

NO → Do not delegate

NO

Do not proceed without evaluation of need for policy, procedures and/or protocol or determination that it is in the best interest of the client to proceed to delegation.

Step Two – Communication

Communication must be a two-way process

**The nurse:**
- Assesses the assistant’s understanding
  - How the task is to be accomplished
  - When and what information is to be reported, including
    - Expected observations to report and record
    - Specific client concerns that would require prompt reporting
  - Individualizes for the nursing assistive personnel and client situation
  - Addresses any unique client requirements and characteristics, and clear expectations of:
    - Assesses the assistant’s understanding of expectations, providing clarification if needed.
    - Communicates his or her willingness and availability to guide and support assistant.
    - Assures appropriate accountability by verifying that the receiving person accepts the delegation and accompanying responsibility

**The nursing assistive personnel:**
- Ask questions regarding the delegation and seek clarification of expectations if needed
- Inform the nurse if the assistant has not done a task/function/activity before, or has only done infrequently
- Ask for additional training or supervision
- Affirm understanding of expectations
- Determine the communication method between the nurse and the assistive personnel
- Determine the communication and plan of action in emergency situations.

**Documentation:** Timely, complete and accurate documentation of provided care
- Facilitates communication with other members of the healthcare team
- Records the nursing care provided.
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Step Three – Surveillance and Supervision
The purpose of surveillance and monitoring is related to nurse’s responsibility for client care within the context of a client population. The nurse supervises the delegation by monitoring the performance of the task or function and assures compliance with standards of practice, policies and procedures. Frequency, level and nature of monitoring vary with needs of client and experience of assistant.

<table>
<thead>
<tr>
<th>The nurse considers the:</th>
<th>The nurse determines:</th>
<th>The nurse is responsible for:</th>
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<tbody>
<tr>
<td>• Client’s health care status and stability of condition</td>
<td>• The frequency of onsite supervision and assessment based on:</td>
<td>• Timely intervening and follow-up on problems and concerns. Examples of the need for intervening include:</td>
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<td>• Predictability of responses and risks</td>
<td>o Needs of the client</td>
<td>• Alertness to subtle signs and symptoms (which allows nurse and assistant to be proactive, before a client’s condition deteriorates significantly).</td>
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<td>• Setting where care occurs</td>
<td>o Complexity of the delegated function/task/activity</td>
<td>• Awareness of assistant’s difficulties in completing delegated activities.</td>
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<td>• Availability of resources and support infrastructure.</td>
<td>o Proximity of nurse’s location</td>
<td>• Providing adequate follow-up to problems and/or changing situations is a critical aspect of delegation.</td>
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<td>• Complexity of the task being performed.</td>
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Step Four – Evaluation and Feedback

Evaluation is often the forgotten step in delegation.

In considering the effectiveness of delegation, the nurse addresses the following questions:
• Was the delegation successful?
  o Was the task/function/activity performed correctly?
  o Was the client’s desired and/or expected outcome achieved?
  o Was the outcome optimal, satisfactory or unsatisfactory?
  o Was communication timely and effective?
  o What went well; what was challenging?
  o Were there any problems or concerns; if so, how were they addressed?
• Is there a better way to meet the client need?
• Is there a need to adjust the overall plan of care, or should this approach be continued?
• Were there any “learning moments” for the assistant and/or the nurse?
• Was appropriate feedback provided to the assistant regarding the performance of the delegation?
• Was the assistant acknowledged for accomplishing the task/activity/function?