

Policy Title: Floating Guidelines

Departments: Inpatient Nursing

Page 1 of 7

Key Words: Floating Staff, Float,
 Floating Floating Staff, Float, Floating

Reference # NA
I. PURPOSE:

To assure maximum utilization of nursing skills and expertise, floating is primarily within designated regions/areas where patient populations require similar nursing skills. When a provision in this document differs from a union contract (CRONA or SEIU), the contract shall take precedence.

II. POLICY:

It is the policy of SHC to provide a process for floating staff from one department to another throughout the inpatient units.

III. DEFINITIONS:

- A. **Acuity Adaptable Unit (AAU):** A unit where both general care and intermediate level patient care are combined.
- B. **Float-In Only Units:** A unit where outside staff may float into the unit, but the regular staff do not float out to non-home units.
- C. **Closed Units:** Units where floating is done on a volunteer basis. If surplus staff are unwilling to take an absent (A) day or PTO day, they are given an alternate assignment.

IV. PROCEDURE:

- A. Float Regions
 - 1. Inpatient Regions
 - a. Acuity Adaptable Units:
 - i. B1, B2, B3, C2, C3, DGR, D1-CSU, D2, D3, E3, FGR, F3, G1, G2S, & H1
 - b. Intensive Care Units:
 - i. D1-CCU, E2, & E29
 - 2. Float-In Only Units
 - a. C1, E1, & G2P/H2
 - 3. Closed Units
 - a. Dialysis, Emergency Department, Life Flight, and Procedural Areas
- B. Orientation
 - 1. All RN's, NA's, MA's, and US's are provided with an orientation that enables them to competently care for patients within their designated float region. Orientation, including unit routines and specific safety and emergency procedures, is provided to staff members when they work on a unit for the first time.
 - 2. New hire Nurses float with their Preceptor during their Orientation. However, once they have completed it, he/she will be exempt from floating for a defined period of time:
 - a. New Graduate Nurse-6 months
 - b. New Hire Experienced Nurse-3 months
 - c. Travel Nurse-3 twelve hour shifts

Policy Title: Floating Guidelines

Departments: Inpatient Nursing

Page 2 of 7

Key Words: Floating Staff, Float,
Floating Floating Staff, Float, Floating

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 C. Unit Staff Guidelines-Floating Within Designated Region

1. Nursing Staff are hired with the understanding that they must float within designated regions. Except in the case of unforeseeable circumstances resulting in critical patient care needs, a nurse is not floated outside his/her designated region in the absence of his/her commitment to do so.
2. If a unit is over staffed and a nurse(s) must float, the charge nurse will determine, based on individual unit procedures, who will be re- assigned. Each unit will keep a log book which indicates name and date of last float for easy reference. If two or more nurses must float and they have the same date of last float, inverse seniority will determine who is reassigned.
 - a. Units will exempt employees with 30 years or more seniority from floating, if operationally feasible.
3. Once a staff member has been floated to another unit, he/she:
 - a. Remains on that unit if needed;
 - b. Returns to his/her home unit; or
 - c. Floats to a different unit (*)

*** NOTE:** Staffing needs are determined every 4 hours and may require floating in 4-hour blocks. In an attempt to minimize disruption of workflow and facilitate continuity of patient care, reasonable efforts are made to avoid floating/changing assignments of a staff nurse more than once in an 8 or 12-hour shift. Exceptions may be made based on specific skill needs or to meet state mandated ratios.

4. A regular staff RN may agree to float in place of a relief nurse in order to maintain continuity of care in certain situations.
5. Nurse's will float in the following order:
 - a. Registry
 - b. Travelers (Regardless of hiring region provided they meet core competency standards for the region that they are floating to).
 - c. Relief Staff working over commitment
 - d. Regular staff working over commitment
 - e. Relief staff (regularly scheduled shift)
 - f. Regular staff including but not limited to specialty roles (as long as another person is available to fill that specialty role)
6. Nursing Assistants, Medical Assistants, and Unit Secretaries float to all units not designated as "Closed Staffing." They can be floated to closed staffing units if an appropriate assignment is available (e.g., 1:1 NA coverage).
7. Nursing Assistants, Medical Assistants, and Unit Secretaries will float in the following order:
 - a. Volunteers (by seniority order)
 - b. Registry Staff

Policy Title: Floating Guidelines

Departments: Inpatient Nursing

Page 3 of 7

Key Words: Floating Staff, Float,
 Floating Floating Staff, Float, Floating

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- c. Relief employees
- d. Temporary and Fixed Term employees
- e. Regular staff, Full time and Regular Part Time employees

D. Unit Staffing Guidelines-Floating Outside of Designated Region

1. The Administrative Supervisor (ANS) in charge of the Hospital has the authority to float any unit-based or relief staff outside of their designated regions in the event of a critical shortage in order to maintain standards of safe care to all patients within the institution. Process for Declaring a Critical Staffing Shortage (Appendix A)
2. Staff who float outside of their designated region will always work under the direct supervision of an RN who has demonstrated competence in caring for patients customarily assigned to that unit.
3. Nurses who volunteer to go to a "Float In Only Unit" will be given preference for assignments provided that the assignment is consistent with their competence and skill level including but not limited to such factors as education, experience, and any specialty/cross training as assessed by their Patient Care Manager.
4. If a nurse asserts in good faith that she/he is not qualified to handle the assignment, she/he may request that the assignment be continued only until a qualified nurse is available and assigned. When the qualified nurse is available and assigned, the nurse may be excused from the remainder of the assignment and given absent time.

E. Float Pool Staff Guidelines

1. Float staff are usually not pre-assigned. Exceptions are determined by the Patient Care Manager of the Float Pool or Administrative Nursing Supervisor.
2. Nurses assigned to the float pool shall be considered to be assigned to the Main medical center campus, except for those float pool nurses who have been assigned in writing to another work location on a regular and ongoing basis.
3. The AAU Float Pool staff may float to any AAU, as well as, any area that is temporarily holding patients waiting for AAU In-Patient beds.
4. Critical Care Float Pool staff may be floated out of their region if the region is plus staff, and no regular or float staff want an A/PTO day.

F. Relief Staff Guidelines

1. The PCM who supervises the relief nurse has priority to preschedule. Relief staff may be pre-assigned to another unit if not needed on their home unit and the home unit Patient Care Manager approves.
2. Prescheduled relief staff can be floated within the region if needed, as

		Last Approved Date: 07/2019	
Policy Title: Floating Guidelines		Page 4 of 7	
Departments: Inpatient Nursing			
Key Words: Floating Staff, Float, Floating	Reference # NA		

determined by the ANS. However, unassigned relief personnel should be used to balance daily staffing in the region before reassigning prescheduled relief staff. Relief staff float within their designated region. If their region has no minuses or no staffing need exists, they are canceled or given an alternate assignment for a minimum of four hours. If the alternate assignment is not accepted the relief staff person is canceled.

3. The PCM/APCM or delegate determines which relief person floats based on skill need and subsequently who's turn it is to float.
4. If all units within the region are staffed according to classification/grid, every effort is made to cancel relief staff as soon as possible prior to the shift, at least no later than one hour before the shift starts.

IV. FLOATING to DIFFERENT WORK LOCATIONS

- A. Outpatient floating regions that include locations outside of the Main Medical Center to and from which nurses may be floated:
 1. Ambulatory Care Clinics: Palo Alto, Newark, RWC
 2. Ambulatory Surgery Centers: Byers, OSC (Redwood City), South Bay Cancer Center.
 3. Outpatient Infusion Centers: ITA, South Bay Cancer Center, Redwood City (SMOC)
 4. Radiation Therapy: AMC, South Bay Cancer Center
 5. Radiology: Palo Alto (Main Hospital), Redwood City, Sherman Ave, Blake Wilbur, Neuroscience Center, AMC, Cancer Center South Bay
- B. The need for floating in the Outpatient setting may be determined the day before or based on established daily staffing practices.
- C. When a nurse who is regularly assigned to a location(s) is floated to another location to which the Nurse is not regularly assigned to work, the staffer or designee must seek volunteers and will make every effort to provide a minimum of two hours' notice.
- D. Nurse's will float in the following order:
 1. Registry
 2. Travelers (Regardless of hiring region provided they meet core competency standards for the region that they are floating to).
 3. Relief Staff working over commitment
 4. Regular staff working over commitment
 5. Relief staff (regularly scheduled shift)
 6. Regular staff including but not limited to specialty roles (as long as another person is available to fill that specialty role.) Charge nurses shall reference the Float Log to determine whose turn it is to float.

Policy Title: Floating Guidelines

Departments: Inpatient Nursing

Page 5 of 7

Key Words: Floating Staff, Float,
 Floating Floating Staff, Float, Floating

Reference # NA

- E. Except in cases of critical staffing shortages, a nurse shall not be floated to a different work location more than one time per shift and will not be required to return to the original location within that shift.
- F. A nurse in a position that has multiple location assignments may not be regularly assigned to work in a location farther than 35 miles from the Nurse's primary work location to which she/he is assigned, absent the Nurse's agreement to such assignments. A Nurse's primary work location is that location at which a nurse works more of her/his time than at any other location.
- G. Nurses assigned to locations other than the main medical center campus may be assigned to multiple locations. Such nurses who travel to or between regularly assigned locations are not deemed to be "floating", unless a nurse is assigned to travel to such a location on a day on which, or at a time at which, the nurse was not otherwise scheduled to work at that location.
- H. Nurses may be entitled to paid travel time and reimbursement for mileage, pursuant to applicable law.

V. COMPLIANCE:

- A. All workforce members including employees, contracted staff, students, volunteers, credentialed medical staff, and individuals representing or engaging in the practice at SHC are responsible for ensuring that individuals comply with this policy.
- B. Violations of this policy will be reported to the Department Manager and any other appropriate Department as determined by the Department Manager or in accordance with hospital policy. Violations will be investigated to determine the nature, extent, and potential risk to the hospital. Workforce members who violate this policy will be subject to the appropriate disciplinary action up to and including termination.

VI. RELATED DOCUMENTS / PROCEDURES:

- A. *8.70 Staffing and Scheduling*

VII. APPENDICES:

- A. A: Algorithm for Declaring a Critical Staffing Shortage

VIII. DOCUMENT INFORMATION:

- A. Legal References / Regulatory Requirements:
 - 1. Enter document information. One item per bullet.
- A. Author/Original
 - Date: 1. 2/78
- B. Gatekeeper of Original Document:
 - 1. PCM Float Pool Program

		Last Approved Date: 07/2019	
Policy Title: Floating Guidelines		Page 6 of 7	
Departments: Inpatient Nursing			
Key Words: Floating Staff, Float, Floating	Reference # NA		

- C. Distribution and Training Requirements:
 - 1. New documents or any revised documents will be distributed to Department Manual holders. The department/unit/clinic manager will be responsible for communicating this information to the applicable workforce members.
- D. Review and Renewal Requirements:
 - 1. This policy will be reviewed and/or revised every three years or as required by change of law or practice.
- E. Review and Revision History:
 - Julie Tisnado, ACNO, Ambulatory Care, 4/17, 7/19
 - Anita Girard, ACNO, Inpatient Care 7/19
 - Approvals: Salem Paschal, PCM Float Pool Program, 4/17, 7/19
 - Gretchen Brown, Interim Associate Chief Nursing Officer, 4/17, 7/19
 - Dale Beatty, VP, CNO 7/19

Previous: 2/80, 11/82, 11/83, 10/06
2/79, 11/81, 2/85, 4/88, 6/91, 8/93, 7/94, 1/95, 3/98, 12/00, 10/02, 2/04,
11/05, 7/07, 11/07, 4/08, 11/10, 8/13, 7/16, 4/17, 7/19

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Appendix A:

Algorithm for Declaring a Critical Staffing Shortage

1. The Resource Nurse (RSN) notifies the Staffing Office or designee that the unit/area is understaffed.
2. The Staffing Office or designee determines if there are plus staff available in the appropriate region to float.
3. The Resource Nurse will ask staff to work overtime if able.
4. The Staffing Office and/or RSN will call staff at home for Short Notice Call (SNC).
5. The Staffer offers extra Nursing Assistants if available to offset RN need if appropriate.
6. The Resource Nurse will notify the On-Call Manager of staffing needs and the problem solving that has been done thus far. If possible, the PCM/APCM will come in to assist as needed.
7. If all have been exhausted and the staffing issue is unresolved, then a “Critical Staffing Shortage” is called for that particular unit by the Administrative Nursing Supervisor (ANS).
8. If the staffing issue is unresolved, the ANS will consult with Nursing leadership as needed.
9. CRONA will be notified by the ANS or their designee within 24 hours by calling the CRONA Office.