

**Assisting and moving: competency / confidence self- assessment - basic moving and**

**handling transfer skills for OTs and CCOs**

**Name:**

**Team:**

**Date completed:**

**"Occupational therapists using moving and handling techniques should be able to competently assess, advise and then be able to teach service-users, carers, family, and other professionals as appropriate. The occupational therapists should also have knowledge of equipment related to the above, including risk assessment/management (e.g. provision of hoisting/standing or turning aids)."[[1]](#footnote-1)**

The following key areas will be used to assess competence and confidence and identify any additional support required to meet the required standard[[2]](#footnote-2)

|  |  |
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| 1 | Moving and handling was done in the way assessed as being appropriate for this person – clear justification for moving the person (clinical reasoning) |
| 2 | Completion of a risk assessment (risks associated with the Task, the Individual handler(s), the Load (person), the Environment (TILE). |
| 2 | Prepare the person- Effectively communicated, talked through manoeuvre,  |
| 3 | Prepare the environment/equipment – Area was cleared |
| 4 | A lead person was identified and they gave appropriate instructions.  |
| 5 | Correct equipment was selected and appropriately used  |
| 6 | Equipment checks were undertaken prior to use  |
| 7 | The safer moving and handling principles were incorporated throughout the manoeuvre - Consideration given to reducing unnecessary movement, stooping and task repetition |
| 8 | Effective communication was maintained throughout with the person and staff |
| 9 | Holds used were appropriate  |
| 10 | The person’s independence was promoted and they were encouraged to participate in all ways possible |
| 11 | The person was not rushed or pressured in anyway |
| 12 | The persons dignity was maintained throughout the manoeuvre  |
| 13 | Good posture and stability was maintained |
| 14 | The manoeuvre was safe and effective – the person is in the required position  |
| 15 | The persons comfort was checked throughout and at the end of the manoeuvre |

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| **Key competencies** |
| **Have you had formal moving and handling training Yes / No** **If Yes, how long ago was your training?** |
|  | **Competent****Yes / No** | **Confident** **Yes / No** | **Additional support / training required: provide detail** |
| 1. Inanimate load handling
 |  |  |  |
| 1. Sitting to standing
 |  |  |  |
| 1. Standing to sitting
 |  |  |  |
| 1. Repositioning in a chair
 |  |  |   |
| 1. Walking
 |  |  |  |
| 1. Standing transfers
 |  |  |  |
| 1. Rolling & turning in bed
 |  |  |  |
| 1. Inserting and removing slide sheets without rolling
 |  |  |  |
| 1. Moving up the bed
 |  |  |  |
| 1. Use of a 4-way glide
 |  |  |  |
| 1. Fitting a sling
 |  |  |  |
| 1. Transfer using an active hoist
 |  |  |  |
| 1. Transfer using a passive hoist
 |  |  |  |
| **Overall assessment outcome** |  |  |  |

General comments

1. RCOT Suggested basic moving and handling transfer skills [↑](#footnote-ref-1)
2. RCOT Framework for safer person handling practice [↑](#footnote-ref-2)