

**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)

|  |  |
| --- | --- |
| 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)