

X Education Services

Protocol for the Provision of Community Equipment for Schools

Revised **Oct 2016**

Contents:

1. Key Roles and Responsibilities
2. Assessment and Provision
3. Ordering Process
4. Financial Arrangements
5. Training
6. Communication

Introduction

This document has been developed in the context of the main 'x Partnership Joint Protocol' which details the overarching Partnership arrangements for the provision of community equipment. This will be an Appendix to that document.

Section 1 - Key Roles and Responsibilities

- 1.1. A range of community equipment is available to effectively support children with disabilities or illness, to maximise their educational potential within school settings including both ASL and mainstream schools.
- 1.2. This equipment is assessed for use by **individual pupils** either by NHS Physiotherapists (Physio) or Occupational therapists (OT). An external contractor, also assess for equipment which is required to support Moving and Handling requirements of staff. Equipment assessed for by **the external contractor** will be ordered directly by Education headquarters staff- see Section 3. (Note: in some services this may be carried out in-house where suitable M&H advisor staff are available)
- 1.3. **OT & Physio staff** are responsible for assessing the needs of the child and identifying the appropriate equipment solutions to meet these needs.
- 1.4. **The external contractor** is contracted by Education services to provide assessments for the Moving & handling of a child, by relevant responsible adults who are working with that child. They will identify appropriate equipment required to meet these needs. They will be expected to use the Community equipment service Core stock list to select suitable products from the range of products held by the Store.
- 1.5. Items for multiple use within the school will continue to be ordered separately by Education out with the Equipu arrangements. However for the provision of some products e.g. *height adjustable desks & changing plinths for generic use*, the Community equipment service professional advisor will be able to provide advice on 'recommended' products following review via the x Partnership Equipment Review Group.
- 1.6. Education Services are responsible for authorising recommendations and paying for the provision of this equipment.
- 1.7. The equipment is accessed via the **x Partnership Store service**. Their function is to:
 - Procure, store, recycle, and maintain equipment to relevant health and safety requirements.
 - Deliver and uplift equipment directly to/from the schools
 - Arrange for repairs as requested.
 - Arrange for the annual testing of relevant equipment provided by Equipu, within the schools.

Section 2 - Assessment and Provision

2.1 Equipment ordered from the X Partnership service and paid for by Education services will be provided for the key purpose of supporting the individual child to function effectively within the school environment (including equipment to support moving and handling, and self-care)

2.2 The Scottish Occupational Therapist Seating Assessment Profile (Appendix D) will be used to support effective practice in the assessment, provision, and ongoing maintenance of the specialist seating.

<p>The main categories of equipment which Education will pay for are:</p>	<p>Seating, standing frames, mobile hoists, changing tables, walking aids, and toileting equipment. This list can be reviewed as required with agreement between the Partners. Note: toileting equipment may be low cost items (under £100) but can still be accessed via X Partnership.</p>
<p>Small items, which are used by the school to support the child <u>to complete educational tasks</u> (e.g. slope boards, pencil grips etc), and non-standard desks (e.g. height adjustable) are paid for locally from the school's devolved budget.</p>	

The principal of 'minimum intervention, maximum independence' (and the avoidance of over-prescription) shall underpin every assessment and alternative forms of managing should have been exhausted.

In line with the 'X Partnership Policy for the Provision of Core Stock and Special Order (Non-stock) Equipment', assessors should consider the use of core stock items and recycled alternatives, in the first instance, before requesting the purchase of new items. Review of appropriate core stock will be ongoing via the established Children's X Partnership Equipment Review Group to support standardisation of practice and procurement efficiencies.

Section 3 - Ordering Process

The flow chart in **Appendix A** illustrates the process for ordering equipment via the X Partnership system.

This clarifies that:

- The **OT or Physio** will order the equipment directly on the X Partnership IT system.
- The **OT/Physio** will complete the 'Checklist for equipment ordering' (**Appendix B**) and will send this to Education centre staff to support them in considering Authorisation. [insert email address](#) The **OT/Physio** will copy the Head Teacher into the email so that they know the request has been processed.
- Where an external contractor is used for M&H assessment, these assessments will be ordered directly by **Education headquarters staff**. The **Head Teacher** will send requests from the contractor directly to Education headquarters staff so that they can process the order directly. Education staff will check that the contractor has identified and selected equipment from the X Partnership Core list.
- For OT/Physio orders, **Education headquarters staff** will authorise every order and send an email to confirm the decision to the OT/Physio assessor and to the Head Teacher.
- Authorisation will be carried out either by designated **headquarters staff or the Head of Service**, dependent on whether the equipment is recycled, or where the item is to be purchased from new and the value is over £100 (per flowchart).
- When an **OT or Physio** orders on the system, they will select an identity from the drop down box for the budget area the equipment will be ordered against e.g. locality (North East) or category of schools (early years) or named schools if small authority. This will be dependant on the school base and not the child's home address.* note: however the child's home residence must be inside the Education authorities boundaries.

- Any staff placing an order will also select the 'Care Group' (e.g. 'Children') and the 'Reason for provision'. There are 4 'Reason' categories created for Education services – 'Education- early years'; 'Education – ASL'; 'Education – primary'; 'Education – secondary'.

Repairs

If a repair or uplift is required, this requires to be arranged by **designated staff in the school** phoning the X Partnership Store service directly.

Section 4 - Financial Arrangements

Education Services have an overall budget which will be monitored against individual localities to offer transparency in the demands and budget pressures across the service area.

In line with the overall 'X Partnership Joint Protocol', managers of assessing staff (Physio and OT) are expected to take responsibility for the monitoring and supervision of X Partnership expenditure by their staff, irrespective of which budget the charges will come from, and work to agreed Education budget arrangements and constraints.

Four weekly monitoring X Partnership reports provide Education managers with detailed information on the expenditure against their budgets. The X Partnership Activity sheets name staff who have ordered and describe the types of equipment selected. This information allows managers to monitor the appropriateness of service usage, as well as expenditure by others against their budgets. It is the responsibility of Education services to set their Budget and advise of any constraints on Budget usage over the financial year.

Section 5 - Training

IT Training and ongoing IT system support is available via the X Partnership Store Service.

All staff with authorisation and governance responsibilities for the Education X Partnership budget should be trained on the use of the system to allow effective processing of orders and the use of the wide range of financial and monitoring information.

Section 6 - Communication

A Monitoring Group will support the delivery of the new service arrangements and ongoing monitoring to support the delivery of the service. This Group is composed of representatives from Education Services, X Partnership Store service provider, the X Partnership Project Manager, and Children's Services Physio and OT representatives.

As part of overall governance arrangements, Education representatives will be invited to attend each of the key X Partnership governance groups- X Partnership Steering Group (senior management); Operational Development Group (operational level); Finance Group (finance/budget rep).

The X Partnership Project Manager will support Partners in all relevant communication around the Protocol and will actively engage with service areas on an ongoing basis to ensure effective delivery of agreed arrangements.

Example ORDERING PROCESS

Requirement for Item Identified by OT/Physio/M&H .

Order

Record

CYPS/OT/Physio logs into Equipu online.
Is required item available from recyclable stock? Y/N

OT/Physio completes Checklist and sends to *HQ copying in HT.
For M&H assessments, HT contacts HQ to process request

YES

Raise order on Equipu online system
HQ authorises online.
Email Checklist to HQ with order details.

[*cypsenquiries@education.glasgow.gov.uk](mailto:cypsenquiries@education.glasgow.gov.uk)

NO

Is value of new item to be ordered under £100? Y/N

YES
Raise order online.
Email Checklist to *HQ with order details.

NO
Raise order online.
Email Checklist to *HQ with order details. CYPS will pass to Head of Service for approval.

Y/N
Yes – order

NO

Head of Service rejects request for purchase



Reason for refusal advised to OT/Physio and Head of Establishment by email, & copied to child/young person's central CYPS file



CYPS order item where recommended by M&H

Copy of Checklist placed in child/young person's central CYPS file

Appendix B

CHECKLIST FOR EQUIPMENT ORDERING TO EVIDENCE CLINICAL REASONING AND SUPPORT EFFECTIVE EQUIPMENT PROVISION

Date:

<ul style="list-style-type: none"> • Child's name: 	DOB/ CHI No.
<ul style="list-style-type: none"> • What equipment is being ordered? • X Partnership order number • Cost of the equipment [as per X Partnership website costs[core stock] or supplier's non-stock order quotation] 	
<ul style="list-style-type: none"> • Why is the equipment needed? 	
<ul style="list-style-type: none"> • When is the equipment needed? 	
<ul style="list-style-type: none"> • Who will use the equipment and where will it be used e.g. home, nursery, school? 	
<ul style="list-style-type: none"> • Have the child and family agreed to this equipment? 	
<ul style="list-style-type: none"> • Is the environment suitable? 	
<ul style="list-style-type: none"> • Is space available? 	
<ul style="list-style-type: none"> • Does child/family/education staff need training in the use of the equipment? 	
<ul style="list-style-type: none"> • Who will provide this training? 	
<ul style="list-style-type: none"> • Are there current identified risks that should be highlighted to patient/family/school? 	
Delivery details :-	
<ul style="list-style-type: none"> • Where is the equipment being delivered to? - Please name school and give address. 	
<ul style="list-style-type: none"> • Do family or school need to be notified for access? 	
<ul style="list-style-type: none"> • If so what phone number is to be used? 	
<ul style="list-style-type: none"> ▪ Expected delivery date? 	
<ul style="list-style-type: none"> • Date of visit to check/set up equipment? • Who will do this? • Where will this take place? 	
<ul style="list-style-type: none"> • Date of equipment review? • Who will do this? • Where will this take place? • Is there a Seating Profile in use? 	
<ul style="list-style-type: none"> • Name/ title and contact details of the professional who has ordered this equipment? 	



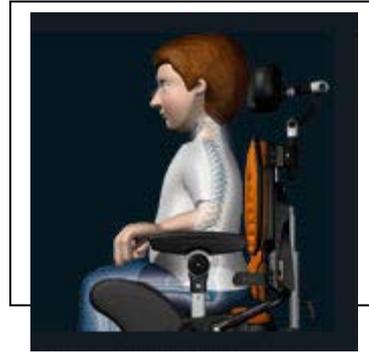
Scottish Occupational Therapists Cerebral Palsy Network
Seating Profile for School

EXAMPLE



Child's name: Joseph Bloggs		CHI Number: 0101013333	
Date: 01/01/01		Review Date: Aug 10 OR as requested by school/parents.	
Name of Therapist: OT Achamore		Therapist Contact Number: 0123456	
Nominated responsible/contact person within school: Class teacher			
Reasons for Seating: This chair will position Joseph in an upright, symmetrical supported position to provide him with a functional position to carry out classroom work, and to minimise the risk of aspiration/choking during eating and drinking.			
Equipment Details:			
Manufacturer: Leckey	Type: Mygo	Size: N/A	Serial Number: 123/09
Suppliers contact details Leckey Designs Ltd - Kilwee Business Park, Dunmurry, BT17 OHD Northern Ireland - 0800 318 265 Rep Name/contact details Martin Rennie – 07803 186 350		Location of Manufacturer's Instructions School file	
Repair and Breakages contact: If you believe the chair to be faulty in any way, immediately inform X PARTNERSHIP on 0141			
Instructions for transferring child into/out of equipment Please see Glasgow City Council's Moving & Handling Guidelines. If in doubt, contact ...			
Prior to transferring Joseph in/out of equipment, please ensure:			
<ol style="list-style-type: none"> 1. You are familiar with the chair, adjusting straps, fitting/removing accessories as appropriate. 2. Brakes are on. 3. All the straps are loosened. 4. Chair is adjusted to appropriate height (ie most comfortable position for carers for hoisting) 5. Chair is adjusted to appropriate angle of tilt/recline (ie slightly tilted for hoisting). Please remember to lock/unlock the mechanism before & after tilting chair. 6. Remember to re-adjust height & tilt after transfer to ensure Joseph is in the position recommended for function (as in photo on reverse of this page) 			
Also			
<ul style="list-style-type: none"> • When transferring into the equipment always secure Joseph using the pelvic strap first - before any other straps/harness. • When transferring out of the chair, always unfasten the pelvic strap last after you have unfastened all other straps/harness. • After transfers out of the chair, ensure the straps are slackened - ready for the next transfer. • After transfers the chair should be adjusted to an upright/slightly tilted position. Never fully recline for feeding and classroom activities etc unless specified by the Therapist. • PLEASE SEE MANUFACTURER'S WRITTEN INSTRUCTIONS FOR USE ON HOW TO MAKE THE ABOVE ADJUSTMENTS. 			

Positioning Joseph using the features of the equipment



PELVIS:

- Ensure Joseph's bottom is touching the backrest of the chair or the he will be unable to achieve an upright trunk position & his head position for safe eating & drinking may be compromised.
- Ensure that Joseph is positioned with the pelvis touching the backrest before fastening the pelvic strap – allow 1-2 finger spaces between the strap & body to ensure it is secure but not too tight. Failure to do this may lead to Joseph sliding down in the chair & potentially serious harm being caused.
- Ensure Joseph is not weight bearing more through one hip than the other as this can cause him to lean to one side, making sitting and head control difficult.
- Ensure one knee is not further in front than the other. If so, readjust the pelvis.
- Never position the pelvic strap over the pelvic supports – instead the strap should be positioned under or inside the pelvic support pads.

TRUNK:

- Ensure Joseph sits in the middle of the seat.
- Position chest harness and thoracic supports over Joseph's trunk BUT not too close to the neck. These should be adjusted to fit snugly to ensure his shoulders & back touch the backrest and he is not leaning to one side.
- Do a final check to ensure Joseph's breathing is not compromised & that the harness is clear of any feeding tubes etc.

HEAD:

- Ensure Joseph's head is in an upright, midline position (in alignment with trunk) with a slight chin tuck. NEVER allow his head to tip back or the chin to point upwards, as this is likely to increase the risk of choking.

LEGS AND FEET:

- Ensure thighs are resting along the full length of seat base.
- Ensure hips, knees and ankles are at 90°.
- Pay particular attention when moving legs if there is any risk of hip dislocation etc.
- Foot straps should be fastened.

SHOULDERS/ARMS:

- Ensure shoulders/arms are positioned forward on the tray
- Ensure elbows rest on the tray/table and do not slip inside the cut out on the tray

PLEASE SEE MANUFACTURER'S WRITTEN INSTRUCTIONS FOR USE ON HOW TO USE/ADJUST ANY OF THE ABOVE FEATURES OF THE EQUIPMENT.

Accessories

Pelvic strap	<input checked="" type="checkbox"/>	Pommel	
Shoulder/trunk harness	<input checked="" type="checkbox"/>	Knee block	
Pelvic supports	<input checked="" type="checkbox"/>	Footplates/sandals	<input checked="" type="checkbox"/>
Trunk supports	<input checked="" type="checkbox"/>	Tray	<input checked="" type="checkbox"/>
Wrap around trunk support + buckle		Height adjustment	<input checked="" type="checkbox"/>
Head support	<input checked="" type="checkbox"/>	Tilt in space	<input checked="" type="checkbox"/>
		Switch mount	

Positioning child within environment

Every attempt should be made to position Joseph directly in front of what he is looking at or who he is communicating with, to eliminate the need for Joseph to turn his head. Adjust chair to height of others/the activity to ensure he is at eye level.

Frequency and duration of use

- This piece of equipment should always be used for eating & drinking if Joseph is fed orally.
- It is important to change Joseph’s position regularly as he is unable to change position independently. Failure to do this over time could result in tightness of the Joseph's joints resulting in loss of mobility, particularly of the hips, knees and spine. Overtime this can result in loss of functional abilities.
- Discomfort (and in time, pressure sores) can also be caused by failure to change position on a regular basis.

Specific Recommendations for function

- To optimise the use of Joseph’s hands - use this chair with full support.
- For looking & listening activities not requiring hand use – Joseph could be positioned on the floor/bench/stool with his peers to work on sitting ability.
- Angle the tray to aid vision as appropriate.
- Ensure a consistent approach between home & school re positioning/toileting program.

Safety checklist Refer to Manufacturer's written instructions for use & safety warnings.

- Before you use this equipment - ensure you are familiar with this chair & its working parts, as well as how to position Joseph safely.
- Joseph should not be left unattended when using chair.
- The chair is for indoor use only, do not use outside.
- TILTING: Take extra care to hold the push handle firmly if Joseph is sitting in the chair when it is being adjusted. Practise using the tilt mechanism before adjusting the tilt with Joseph in the chair. Please remember to lock/unlock the mechanism before & after tilting chair.
- Read & follow the Manufacturer's written instructions, particularly relating to daily/monthly equipment checks, cleaning of the chair & battery care.

Emergency Procedures

Please ensure you are confident that you are able to get Joseph out of this piece of equipment quickly in case of an emergency before you use it, eg if he is choking.

Be aware of the Joseph's fire evacuation procedure.

Contact OT if

- chair has been outgrown
- you are unable to position Joseph as in photograph/demonstration
- Joseph is distressed or uncomfortable due to positioning
- there is a change in Joseph's needs/condition
- Joseph changes from being orally fed to non-orally fed OR non-orally fed to orally fed

You will know if Joseph has outgrown the chair if you observe any of the following:-

- Bottom touching backrest, but the backs of the knees are more than a 2 finger depths from the front of the seat.
- The top of the trunk supports are lower than 2 fingers under the arms.
- Joseph's shoulders are higher than the top of the backrest.
- His head is no longer supported by the headrest.
- Joseph's knees are higher than his hips (eg thighs no longer rest on the seat base)
- The trunk or pelvic supports are too tight.

Points to note

It is Education's responsibility to ensure that:

- a) That all staff requiring to work with this Joseph are made aware of, have access to, and agree to follow the recommendations contained in this document, its summary and the Manufacturer's written instructions.
- b) That the above three documents and the chair are passed onto new staff when the Joseph moves class/school.
- c) Faults are reported promptly to X PARTNERSHIP
- d) Chair is cleaned & maintained in accordance with Manufacturer's instructions.
- e) That no adjustments are made to the chair or accessories removed from use without permission of the Therapist.
- f) That the chair is not used by any other child in the school unless recommended by the Therapist.
- g) Staff training needs are identified and requested appropriately.
- h) That the summary of this document remain attached to this piece of equipment at all times.
- i) The summary of this document is removed from the chair prior to it being returned to the Store.

Education are responsible for any adjustments made without prior OT consultation.

I have read, understood and agree to follow the recommendations outlined above. The school has received the Manufacturers Instruction Manual & the summary of this document to attach to the chair.

Name..... Designation.....

Signed..... Date:.....

Signed Head teacher for Additional Support Needs Date:.....

Signed (Occupational Therapist)..... Date:.....