Managing Trial Process
Checklist for Assessors

Providing equipment to a client involves complex project management. This means it requires adherence to specific processes and responsibilities, unlike a simple in-store purchase. Please use this checklist to help you work through the trial process.

## Before you submit a trial request

1. Complete a **detailed assessment** which includes:

[ ]  Diagnosis with current functional presentation

[ ]  Goals/issues identified

[ ]  What equipment is currently in place

[ ]  Photos if applicable, with consent

[ ]  Do you have the correct credentials/ Are you working within your scope of
 practice/Do you need supervision to support your request?

1. Ensure **measurements** are accurate, including:

[ ]  Person’s dimensions

[ ]  Person’s weight

[ ]  Environment (doorways, turning circles, floor capacity, etc.)

[ ]  Vehicle (e.g. appropriate space, height, stowage, etc.)

[ ]  Record measurements on the relevant Enable New Zealand specification
 (spec) form, to facilitate refurbished equipment provision

1. Identify equipment considerations that meet the specifications required.

With rationale for the following:

[ ]  Value for money

[ ]  Easy to use (for the individual, whanau, carer, school, etc)

[ ]  Will it meet the long-term need, including durability

[ ]  Will the equipment suit the environment

[ ]  Safe storage for the provided trial equipment

[ ]  Discuss potential options with suppliers

[ ]  Send the same Enable NZ spec form to all suppliers to obtain a quote

[ ]  Do I need further information/support before requesting a trial

1. Do I need to **trial** this, or can I go directly to **purchase**?

[ ]  Include relevant quotes that have been obtained using the Enable NZ SPEC form

## When you’re ready to trial

1. Do I have **all** the components/parts I need to begin the trial?
2. Have I identified **who** needs to be present?

[ ]  Whanau/carer [ ]  Supplier [ ]  Colleague/peer, [ ]  Other

1. **Where** is the trial going to occur?
2. **Safety and access** [ ]  Physical obstacles/access [ ]  Pets [ ]  Space to work [ ]  Parking
3. Schedule first **and** follow up appointments at the same time and:

[ ]  Identify the length of trial with all involved

[ ]  Identify where the equipment is coming from (supplier or Enable NZ)

[ ]  Determine if the items can be kept from trial or if it needs to wait for a purchased
 items

[ ]  Clarify client/support person responsibilities

[ ]  Provide written instructions, including care of equipment, and relevant contact
 details

[ ]  Consider storage of packaging materials/boxes and spare parts

[ ]  Identify measurable goals to assess trial success

## Conclusion of the Trial

#### If successful

[ ]  Obtain a final post-trial quote: Some equipment may require a supplier completed script
 form

[ ]  Check if the quote is correct? Did you review the quote line by line (no duplications,
 missing or extra items)
[ ]  Include final photos if required
[ ]  Does the client have the care and use documentation and has it been explained?
[ ]  Submit current successful trial quotes and relevant documentation promptly for
 purchase, even if only part of the whole package

#### If unsuccessful

[ ]  Inform Enable NZ and the supplier of the unsuccessful trial and arrange a return of
 the equipment

[ ]  Provide a rationale to support the request for alternative trial equipment

[ ]  Discuss with a CSA if you require any support with alternative options

**Note:** Is your documentation clear enough that another therapist can follow through if you unexpectedly become unavailable?

MRES and DSS operational guidelines:

[Disability Support Services: EMS Equipment Manual](https://www.disabilitysupport.govt.nz/assets/Equipment-manual-V21.pdf) (Section 8)

[ACC MRES Operational Guidelines for ACC Assessors](https://www.acc.co.nz/assets/contracts/mres-og.pdf) (Section 7)