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)