

# 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 list as a checklist to help you work through the stages involved.

### Before you submit a trial request

1. Complete a **detailed assessment** which includes:
  - ☐ Clear diagnosis with functional presentation
  - ☐ Goals/issues identified
  - ☐ What equipment is currently in place
  - ☐ Photos if applicable with consent
  - ☐ Do you have the correct credentials/supervision to support your request?
2. Ensure **measurements** are accurate including:
  - ☐ Individual's dimensions
  - ☐ Person's weight
  - ☐ Environment (can equipment fit through the doorways, floor capacity, etc)
  - ☐ Equipment/product specification/specification forms (Enable New Zealand) to facilitate refurbished equipment provision
  - ☐ Vehicle (e.g. appropriate space, height, stowage, etc)
  - ☐ Complete any relevant specification forms
3. Identify **equipment considerations** with rationale for the following:
  - ☐ Value for money
  - ☐ Is it easy to use (for the individual, 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
  - ☐ Do I need further information/support before requesting trial/equipment availability/quotes obtained
4. Do I need to **trial** this, or can I go direct to **purchase**?

### 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?
  - ☐ Whānau/Carer ☐ Supplier ☐ Colleague/peer, ☐ Other
3. Have I considered **where** the trial is to occur?

4. Consider **safety** for all
  - ☐ Physical obstacles/access
  - ☐ Dogs, people
  - ☐ Space to work
  - ☐ Parking
5. Schedule first **and** follow up appointments at the same time
  - ☐ Identify length of trial with all involved
  - ☐ Identify the source of equipment (supplier or Enable New Zealand)
  - ☐ Determine if equipment can be kept from trial or if it needs to wait for a purchased item
  - ☐ Client/Support person responsibilities
  - ☐ Written instructions ready to be provided, including care of equipment, and contact details
  - ☐ Storage of packaging materials/boxes and spare parts
  - ☐ Measurable goals identified with all

## Conclusion of the Trial

### If successful

1. Obtain the final quote:
  - ☐ Is the quote current
  - ☐ Did you review the quote line by line (no duplications, missing or extra items)
2. Final photos if required
3. Does the client have the care and use documentation and has it been explained
4. Submit successful trial quotes and any other relevant documentation as soon as possible for purchase even if it is only a part of the whole package

### If unsuccessful

Inform Enable New Zealand and the supplier of the unsuccessful trial and arrange a return of equipment

1. Provide a rationale to support the request for alternative trial equipment
2. Discuss with the clinical services advisor if require any support

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

## MRES and DSS operational guidelines:

[www.disabilitysupport.govt.nz/assets/Equipment-manual-V21.pdf](http://www.disabilitysupport.govt.nz/assets/Equipment-manual-V21.pdf)

(section 8 in EMS Equipment Manual)

[www.acc.co.nz/assets/contracts/mres-og.pdf](http://www.acc.co.nz/assets/contracts/mres-og.pdf)

(section 7 in ACC MRES Operational Guidelines for ACC Assessors)