**Moving and Handling Education Overview**

**Introduction**

The document ‘NHS Scotland Manual Handling Passport and Information Scheme’ was issued by the Scottish Government (CEL 14, 2011) and identifies minimum standards for manual handling. To meet these standards the following recommendations were proposed:

1. Move from classroom based training to a competency assessment approach
2. Development of formal self assessment documentation based on a ‘reflective practice’ model to support the existing KSF and PDP processes.

The NHSGGC Health and Safety Forum in May 2011 agreed to the proposals in principle and in August 2012 agreed to support the methodology outline in this paper

Implementation of these recommendations will allow the focusing of moving and handling education to individuals who require it based on skill gap and risk. Staff who require further moving and handling input will generally receive this in their place of work provided by the Moving and Handling Practitioners, removing the need in the majority of cases to send staff on classroom based training courses.

**Competency Assessment Approach**

Staff within Partnerships have been categorised into two groups depending on risk level for manual handling (Appendix 1):

* Category A staff include:

Staff groups who are regularly required to handle (move or transfer) either people or loads. This group will receive an annual competency assessment and are expected to undertake the moving and handling modules on LearnPro once every three years.

* Category B staff include:

Staff groups who are infrequently (or not) required to handle people or move loads as part of their duties. This group are expected to undertake the moving and handling modules on LearnPro once every three years which will be sufficient for this category of staff, however, they will receive onsite support if required.

The client handling competency assessments will be rolled out to the Category A staff groups starting with Mental Health and Learning Disability nurses, being completed within 24 months of the start date which is proposed to be November 2012, assuming the proposals are agreed to.

A different model for facilities staff has been agreed and is currently being implemented.

*Implementation process*

Prior to the Moving and Handling Practitioners beginning the assessments in an area, a number of information sessions will be held for Local Managers and / or their nominated deputies. These information sessions will give details of the approach and provide the timetable for the assessments.

The Moving and Handling Practitioner’s (MHP) will undertake the initial assessments of Category A Partnership staff within their ward / department whilst they are performing their normal work activities. Staff will be identified as being low, medium, high or very high risk in terms of their moving and handling practice ([assessment criteria](https://www.nhsggc.scot/downloads/competency-assessment/?wpdmdl=69406&refresh=6405b5525c95d1678095698&ind=1678095633782&filename=moving-and-handling-assessment-criteria-v5.docx)).

Staff identified as medium, high or very high will have skills gaps and as such will receive input in their area of work from the MHP to enable the staff member to bridge the gaps. This input may include individual or group coaching, written information and/or verbal advice. Staff identified as high or very high risk will be reassessed by the MHP to ensure the skills need has been addressed. This will usually occur on the same day as the initial assessment. Staff identified as low risk will have demonstrated no skills gaps during the assessed activity and require no further intervention.

On some occasions a formal classroom based training session may be more relevant. Classroom based skills update sessions will be programmed to support staff requiring this level of input. Staff attending skills update sessions will be expected to identify and agree the learning required with their Local Managers before attending. The [self assessment](https://www.nhsggc.scot/downloads/competency-assessment/?wpdmdl=69406&refresh=6405b5525c95d1678095698&ind=1678095653401&filename=moving-and-handling-self-assessment-clinical.docx) documentation should be used to assist with this process.

After these initial assessments it will be the responsibility of Local Managers to undertake future review assessments. This will ensure that practices are maintained at an appropriate level. Staff will require to be reviewed depending on their needs, that is, staff identified as low risk will be reviewed within 18 months, medium within 12 months and high or very high within 1 month. For staff scoring as Medium, High or Very High, an intervention will occur at the point of assessment, for example, stopping the activity (full body lift) or directing staff towards the self help information on the moving and handling pages of [HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/). The MHP’s will be available to assist the Local Managers in this process and provide input where required to bridge any identified skills gaps.

When the MHP has completed the initial assessments of the staff within an area, the Local Manager will be provided with a report identifying who has been assessed, their risk level and when they require to be reassessed. Additionally, Local Managers will be provided with information on undertaking future assessments and associated processes, the MHP will be available to assist the Local Manager if required.

*Recording and Reporting*

Assessments and the agreed remedial action (if any) will be recorded by the MH Practitioner, countersigned by the staff member being assessed and communicated with the Local Manager. The assessments outcomes will be recorded on Empower by the moving and handling administrators. Activity reports will be generated from Empower and provided to Partnerships Directorates on a monthly basis to include who has been assessed and the outcome of the assessment.

*Skills Updates Sessions*

Skills Update Sessions of two hours (for staff working predominantly with clients on a bed / trolley) and three hours (for staff working with clients in a chair and bed and occasionally using hoists) will be provided to support this approach. Access to these courses will be for:

* A member of staff returning to work after a long term absence who needs to refresh their skills
* A member of staff who is struggling to stay at work due to a musculoskeletal disorder which they perceive is being made worse by how they are currently undertaking their work activities
* During a staff members KSF review, or as a result of undertaking self assessment, that staff members practice is identified as having some skills gaps
* During the competency assessment in the ward, the skills update sessions are identified by the MHP as the most appropriate method of input

The skills update sessions are open programmed to enable delegates to set the content depending on their previously identified needs. Therefore, all delegates attending the sessions should have discussed with their local manager the expected learning outcomes. These sessions should **not** be seen as generic refresher or update training, rather they are designed to address specific individuals learning needs.

**Self Assessment**

Self assessment documentation has been developed for client handling staff [(link)](https://www.nhsggc.scot/downloads/competency-assessment/?wpdmdl=69406&refresh=6405b5525c95d1678095698&ind=1678095653401&filename=moving-and-handling-self-assessment-clinical.docx). This documentation prompts staff to identify learning need in terms of their moving and handling knowledge and skills. This tool can be used as part of the KSF and / or PDP review process and as such, should be discussed and countersigned by your local manager or KSF reviewer.

**Further Information**

Further information including documentation used, assessment criteria and information sheets are available on the moving and handling pages of [HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/). A summary of the competency assessment process and an overview of moving and handling education are available in Appendix two and three.

**Appendix 1**

**Moving and Handling categories for staff**

Category A – Staff groups regularly required to handle (move or transfer) either people or loads. In the case of people this does not include restraint.

Category B – Staff groups who infrequently or are not required to handle people or move loads as part of their duties.

Staff groups will not always fit neatly into either A or B as the environment, population group or equipment required may impact on the outcome, examples;

* A domiciliary podiatrist may be an A whereas the clinic equivalent may be a B
* A domiciliary mental Health Nurse may be a B whereas the ward based equivalent may be an A

The list below is not exhaustive please contact Tracey Hart, Moving and Handling Lead Practitioner for Partnerships if you have any comments.

**Partnership Moving and Handling categories for staff**

|  |  |  |
| --- | --- | --- |
| **Job Family** | **Staff Groups** | **MH Category** |
| *Nursing* | including, District, General, Midwifery, Paediatric and Care of the Elderly | A |
| *Support Services* | including, Caretakers, Caterers, Domestic, Estates, Porters, Security, Stores and Transport | A |
| *Nursing* | including, Mental Health and Learning Disability | A or B |
| *Allied Health Professions* | including, Physiotherapy, Occupational Therapy, Podiatry and Dietetics. | A or B |
| *Nursing* | including, Family Planning and School  | B |
| *Therapies* | including, Psychology, Play, Art, Optometry and Chaplaincy | B |
| *Allied Health Professions* | including, Speech and Language, Orthoptist, and Health Promotion | B |
| *Administrative Services* | including, Finance, HR and Information Systems/Technology | B |
| *Medical and Dental* | including, Consultants, Training Grades, Specialist and Dental nursing | B |
| *Healthcare Sciences* | including, Biomedical, Clinical and Clinical Physiology | B |

**Appendix 2**

**Summary of Competency Assessment Process**

**Competency Assessments (Clinical staff,** [**Category A**](#Categories)**)**

**Low**

**Medium**

**High**

**Very High**

No further input required.

Assessee has evidenced good level of M&H knowledge and skill

Further input required

Assessee has some skills gaps1. Self learning2 with prompting expected

Initial assessments undertaken by Moving and Handling Team

Review assessments to be undertaken by local staff, supported if required by M&H

Further input required.

Assessee has demonstrated significant skills gaps1. Self learning2 with prompting expected. Potential support from M&H required.

Assessment stopped.

Assessee has demonstrated unacceptable practice3. Line management and M&H support required

Review assessment within 18 months.

To be completed by local staff

Review assessment within 12 months.

To be completed by local staff

Review assessment within 1 month.

During initial assessment period, these staff will be reassessed by M&H. After this period, these review assessments will be completed by local staff with assistance from M&H if required4

1 The competency assessment criteria is available [here](https://www.nhsggc.scot/downloads/competency-assessment/?wpdmdl=69406&refresh=6405b5525c95d1678095698&ind=1678095633782&filename=moving-and-handling-assessment-criteria-v5.docx)

2 Information sheets to assist with self learning are available [here](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/)

3 Examples of unacceptable practices are available [here](https://www.nhsggc.scot/downloads/competency-assessment/?wpdmdl=69406&refresh=6405b5525c95d1678095698&ind=1678095668070&filename=mh-information-sheet-no-3-very-high-risk-handling-_v1_.pdf)

4 Contact details for moving and handling are [here](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/)

**Appendix 3**

**Overview of Moving and Handling Education Process – New Staff**

**New staff member**

**Category A staff**

**Category B staff**

**Induction**

[E-Learning Modules](https://nhs.learnprouk.com/lms/login.aspx?ReturnUrl=%2flms%2fuser_level%2fwelcome.aspx)

Complete M&H Induction Checklist

1. [Clinical Staff](http://www.staffnet.ggc.scot.nhs.uk/Info%20Centre/Health%20and%20Safety/Moving%20and%20Handling/Documents/Assessment%20Information/Moving%20and%20Handling%20Induction%20Checklist%20%28Clinical%29.doc)
2. [Support Service Staff](http://www.staffnet.ggc.scot.nhs.uk/Info%20Centre/Health%20and%20Safety/Moving%20and%20Handling/Documents/Assessment%20Information/Moving%20and%20Handling%20Induction%20Checklist%20%28Non-Clinical%29.doc)

Relevant M&H [Foundation Passport modules](https://www.nhsggc.scot/downloads/competency-assessment/?wpdmdl=69406&refresh=6405c770c6beb1678100336&ind=1678095649532&filename=moving-and-handling-passport-foundation-training-core-content-2012.docx) **not** completed

Relevant M&H Foundation Passport modules completed

**Support**

Will be provided by M&H when required e.g. significant increase in M&H activities; assisting staff to return to work following extended absence due to MSD

Staff may chose to undertake [self assessment](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/) of personal practice as part of KSF / PDP / CPD reviews.

[**Induction Course**](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/training-and-education/moving-and-handling-training/) **Undertaken**

1. Staff regularly working with people - 2 day course. Staff occasional working with people - ½ day course
2. Staff regularly handling loads - ½ day course

**Assess Application of Learning**

* Undertake [competency assessment](http://www.staffnet.ggc.scot.nhs.uk/Info%20Centre/Health%20and%20Safety/Moving%20and%20Handling/Pages/MovingandHandlingAssessments.aspx).
* Staff may chose to undertake [self assessment](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/) of personal practice as part of KSF / PDP / CPD reviews.



**Overview of Moving and Handling Education Process – Existing Staff**

No skills gaps identified

Skills gaps identified

**Existing staff member**

**Category A staff**

**Category B staff**

**Refresher**

Complete e-Learning modules on [LearnPro](https://nhs.learnprouk.com/lms/login.aspx?ReturnUrl=%2flms%2fuser_level%2fwelcome.aspx)

(3 yearly)

**Support**

Will be provided by M&H when required e.g. significant increase in M&H activities; assisting staff to return to work following extended absence due to a musculoskeletal disorder

**Assessment**

1. Undertake [competency assessment](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/) (frequency identified by assessment).
2. Staff may chose to undertake [self assessment](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/) of personal practice as part of KSF / PDP / CPD reviews

Direct staff member to [moving & handling HR Connect](https://www.nhsggc.scot/staff-recruitment/hrconnect/safety-health-and-wellbeing/moving-and-handling/) pages for additional learning and / or contact M&H for advice / input

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