**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 and the Acute Division Health, Safety & Fire Forum in June 2011 agreed to the proposals in principle and in January 2012 the Acute Operational Management Group supported the recommendations.

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 the Acute Services Division have been categorised into two groups depending on risk level for manual handling (Appendix 1):

* *Category A* staff include patient handling and facilities staff. In general this group of staff are considered to be at a higher risk of work related manual handling injuries. This group will receive a competency assessment (reviewed within 18 months dependant on risk level) and are expected to attend the core statutory and mandatory training program once every three years.
* *Category B* staff include medical, healthcare science and administrative staff. In general this group of staff are considered to be at lower risk of work related manual handling injuries. This group are expected to attend the core Statutory and Mandatory training program once every three years. It is expected that this will be sufficient for this category of staff, however, they will receive support if required.

The patient handling competency assessments will be rolled out to nursing, midwifery, physiotherapy, occupational therapy and radiography staff groups starting with the higher risk areas of the Acute Division as identified through DATIX. The roll out will start in April 2012 and be completed by March 2014. The roll out program and approximate dates will be available through the moving and handling pages on Staffnet.

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

*Implementation process*

Prior to the assessments beginning in a ward / department, the relevant Lead Nurses and Local Managers will be contacted and the approach discussed with them. The Moving and Handling Practitioner’s (MHP) will undertake the initial assessments of 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 the ward 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 the ward / department, 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.

*Skills Updates Sessions*

The moving and handling modular courses are discontinued and have been replaced with the assessment approach described above. Skills Update Sessions of two hours (for staff working predominantly with patients on a bed / trolley, for example ITU and Theatre staff) and three hours (for staff working on wards) 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 patient 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**

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| --- | --- | --- |
| **Job Family** | **Sub Job Family** | **MH Category** |
| Allied Health Profession | Diagnostic Radiography | **A** |
| Occupational Therapy |
| Physiotherapy |
| Therapeutic Radiography |
| WestMARC |
| Nursing and Midwifery | Community General Nursing | **A** |
| General Acute Nursing |
| Midwifery |
| Paediatric Nursing |
| Support Services | Catering Services | **A** |
| Domestic Services |
| Estates |
| Hotel Services |
| Laundry/Linen Services |
| Portering Services |
| Security Services |
| Sterile Services |
| Stores Services |
| Transport Services |
| Administrative Services | Finance | **B** |
| Information Systems/Technology |
| Office Services |
| Patient Services |
| Allied Health Profession | Dietetics | **B** |
| Orthoptists |
| Orthotists |
| Podiatry |
| Prosthetists |
| Speech And Language Therapy |
| Healthcare Sciences | Biomedical Sciences | **B** |
| Clin Photo/Illustrate Physical |
| Clinical Physiology |
| Clinical Sciences  |
| Technician |
| Medical | Medical Consultant | **B** |
| Staff & Associate Specialists |
| Training Grades |
| Other Therapeutic | Optometry | **B** |
| Play Specialists |
| Psychology |
| Personal and Social Care | Health Promotion | **B** |
| Support Services | Chaplaincy | **B** |

**Appendix 2**

**Summary of Competency Assessment Process**

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

**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 ward / department 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**

Undertake [Statutory / Mandatory Training](http://www.staffnet.ggc.scot.nhs.uk/Human%20Resources/Learning%20and%20Education/Training%20Calendar/Pages/TrainingCalendarAtoZindex.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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