Unit 13

Move and position individuals in accordance with their care plan
Unit purpose and aims

Moving and handling is a very important aspect of care that demands a particular degree of knowledge and skill. This unit will explore the ways in which you move, handle and reposition individuals.

The learner will:

1. Understand current legislation in relation to moving and positioning individuals
2. Understand anatomy and physiology in relation to moving and positioning individuals
3. Be able to minimise risk before moving and positioning individuals
4. Be able to move and position an individual
5. Know when to seek advice and/or assistance from others when moving and positioning an individual
1.1 Current legislation, national guidelines, policies, procedures and protocols in relation to moving and positioning individuals

The main laws for the protection of the health, safety and welfare of all care workers, service users, and others who might be employed in the workplace, are contained in the Health and Safety at Work Act (1974) and the regulations that are made under it.

Specifically, in relation to moving and handling, these are:

- The Management of Health and Safety at Work Regulations 1999
- The Lifting Operations and Lifting Equipment Regulations 1998
- The Provision and Use of Work Equipment Regulations 1998
- The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (2013).

The Health and Safety at Work Act (1974)

The Health and Safety at Work Act (1974) forms the basis of all health and safety legislation. Its primary aim is to safeguard the health, safety and welfare of all workers in all employment. It sets out the general duties that employers have towards employees and members of the public, and employees have to themselves and to each other. The following is a summary of the employer’s and the employee’s legal duties under the Health and Safety at Work Act.

The employer’s duties

To ensure as far as is reasonably practicable, the health and safety and welfare of all employees. In order to fulfill this obligation employers must:

- Make the workplace safe and free from risks to health
- Provide workplace policies and procedures
- Ensure that plant and machinery are safe and that safe systems of work are set and followed
- Assess health and safety risks and take action to reduce identified risks
- Appoint a competent person to assist with health and safety responsibilities
- Provide health and safety information, training and supervision for employees
- Provide adequate welfare and first aid facilities
• Provide free protective clothing and equipment
• Set up emergency procedures
• Take precautions against dangers and provide appropriate safety signs
• Avoid the risk of injury from manual handling operations
• Report certain injuries, diseases and dangerous occurrences to the authorities.

The employee’s duties

Under this piece of legislation employees have a responsibility to:

• Take care of their own and other persons’ health and safety
• Co-operate with employers on health and safety issues
• Not to misuse or willfully damage anything provided for their health and safety.

The Management of Health and Safety at Work Regulations (1999)

This piece of legislation sets out the responsibilities of employers in relation to risk assessments. Regulation 3 states that every employer shall make a suitable and sufficient risk assessment which must be acted upon and reviewed on a regular basis.

The Manual Handling Operations Regulations (1992) define manual handling operations: A load is defined as:

- ‘Anything which is moveable’ e.g. an inanimate object, person or animal’
- ‘Any transporting or supporting of a load (including the lifting, putting down, pushing, pulling, carrying or moving thereof) by hand or bodily force.’

These regulations apply wherever people or objects are moved by hand or bodily force. These regulations impose duties on both the employer and the employee.

- ‘Any transporting or supporting of a load (including the lifting, putting down, pushing, pulling, carrying or moving thereof) by hand or bodily force.’

The employer’s duties

The principle requirements are to:

- **AVOID** the need for hazardous manual handling as far as is reasonably practicable
- **ASSESS** the risk of injury from any manual handling that cannot be avoided
- **REDUCE** the risk of injury from hazardous manual handling as far as is reasonably practicable
- **REVIEW** to ensure that changes are made to an assessment when required.

The employee’s duties

- To follow appropriate systems of work that have been laid down for their safety
- To make proper use of any equipment that has been provided to minimise the risk of injury
- To cooperate with their employer on health and safety matters to protect themselves and to protect others.

If lifting equipment is provided at work then the LOLER regulations apply. These regulations apply to the use of lifting equipment, for example, hoists and slings. Under these regulations employers must ensure that lifting equipment meets the requirements of LOLER.

The regulations generally require that lifting equipment provided for use at work is:

- Strong and stable enough for the particular use and is marked to indicate safe working loads
- Positioned and installed to minimise any risks
- Used safely
- Is examined and inspected where appropriate by a competent person
- Examined before being used for the first time, prior to any use and at regular intervals thereafter.

The employer’s duties are:

- To ensure that equipment is suitable for use
- To maintain equipment in a safe condition so that people’s health and safety is not put at risk
- To ensure that equipment is inspected so that it continues to be safe for use. Inspection should be carried out by a competent person
- To maintain records of all inspections.

The employee’s duties are:

- To follow any training and comply with their employer’s instructions regarding safety
- Report any faults to employer
- Always use appropriate personal protective equipment
- Equipment should be marked to state that it is safe for use
- Employers must also ensure that any lifting operations are properly planned, appropriately supervised and carried out in a safe manner.
The Provision and Use of Work Equipment Regulations (1998) (PUWER)

These regulations cover all equipment used at work including manual handling equipment, for example, slide sheets and handling boards. These regulations require that equipment provided for use at work should be:

- Suitable for the intended purpose
- Safe for use, maintained in a safe condition and inspected at regular intervals
- Used only by people who have received adequate information, instruction and training
- Have suitable safety measures, e.g. markings and warnings.

The employer’s duties are:

- To ensure that equipment is suitable for use
- To maintain equipment in a safe condition so that people’s health and safety is not put at risk
- To ensure that equipment is inspected so that it continues to be safe for use. Inspection should be carried out by a competent person
- To maintain records of all inspections.

The employee’s duties are:

- To follow any training and comply with their employer’s instructions regarding safety
- Report any faults to employer
- Always use appropriate personal protective equipment.

The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (2013) RIDDOR

RIDDOR obliges employers to report major injuries, dangerous occurrences and diseases. HSE states:

“If there is an accident connected with work (including an act of physical violence) and your employee, or a self-employed person working on your premises, suffers an over-seven-day injury, you must send a completed accident report form (F2508) to the enforcing authority within ten days. An over-seven-day injury is one which is not major but results in the injured person being away from work, or unable to do their normal work for more than seven days (including non-work days).”
If an employee suffered a moving and handling injury that resulted in inability to do her/his normal work for more than seven days, the employer would be obliged to report.

**Major injuries including:**
- Fracture other than to fingers, thumbs or toes
- Amputation
- Dislocation of the shoulder, hip, knee or spine.

**Dangerous occurrences include:**
- Collapse, overturning or failure of load-bearing parts of lifts and lifting equipment.
- Diseases: Including certain musculoskeletal disorders and upper limb disorders related to manual handling.

**The Equality Act (2010)**

Under the Equality Act it is unlawful for service providers to treat disabled people less favourably than other people for a reason related to their disability. This extends to the provision of the services themselves or the administration or management of the premises.

Service providers now have a duty to make ‘reasonable adjustments’ to the way they deliver their services so that disabled people can use them.

**Implications of the Equality Act on moving and handling**

This means that individuals who have a disability should never be treated in a way that is less favourable than an individual who does not have a disability. Service providers would be in breach of this piece of legislation if they insisted a service user be moved using manual handling equipment when reasonable adjustments to facilities would enable the individual to retain independence. Reasonable adjustments could also include ensuring that those providing care for the disabled are trained in disability awareness.

**The Human Rights Act (1998)**

The Act sets out a number of wide ranging rights. Three of which most obviously have a potential application to moving and handling.
These are Articles two, three, five and eight:

- Article 2 states that everyone has the right to life
- Article 3 states that no one shall be subject to inhuman or degrading treatment
- Article 5 states that everyone has the right to liberty and security of person
- Article 8 states that everyone has the right to respect for his private and family life, his home and correspondence.

The greatest concern in relation to the moving and handling of people is the perceived conflict between the right of a service user to refuse to be handled in a certain way, and the right of the care worker to refuse to endanger themselves. It is important to remember that this Act applies to the public sector and not to privately or voluntary run institutions.

**Organisational procedures, policies and plans**

Your organisation will have a number of policies and procedures that they are required to produce to satisfy health and safety and care standards. These will also give you more information on how you should work to comply with the legislation that we have discussed. Examples of these are:

- Moving and Handling Policy
- Safeguarding Policy
- Infection Control Procedures
- Individual Care Plans
- Individual Moving and Handling Risk Assessments.

**1.2 Individual responsibilities and accountability in relation to moving and positioning individuals**

Preparing for the moving and handling of individuals is vitally important. This preparation should begin before any attempt is made to move and handle individuals.

It is the employee’s responsibility to:
• Take reasonable care for their own safety and that of colleagues and patients while handling people or loads (Health and Safety at Work Act 1974)
• Use equipment in accordance with training and instructions received (Management of Health and Safety at Work Regulations 1992)
• Comply with existing policies on handling and co-operate with the implementation of any new policies
• Follow the written individual patient handling assessment, which should be included in the nursing plan
• Alert employers to any situation at work that might present a serious and imminent danger.

An employee’s duty to inform management of any shortcomings in existing arrangements for manual handling includes:

• Lack of staff or equipment
• Environmental hazards
• Defects in machinery or equipment
• Injuries or accidents
• Illness or disability affecting handling capacity.

Suitable clothing and personal hygiene
The type of clothing that care workers wear when they are engaging in moving and handling tasks is very important. This can make all the difference between carrying out the procedure safely, and undertaking it with difficulty thus increasing the risk of injury. It is therefore essential that workplace policies in relation to dress code are followed at all times. Shoes should be supportive and flat with soles that have a firm grip. It is especially important that policies pertaining to the wearing of jewellery are also understood and followed. Rings with stones in them should never be worn for work as they pose a serious risk as they could cause trauma to the service user’s skin.
1.3 Health & safety factors

Before moving and positioning individuals, there are several health and safety factors that must be taken into consideration to ensure the safety of the service user, themselves and others.

Many of these factors will be identified in legislation, policies and procedures, but include:

- Only move and position people when trained to do so
- Consulting risk assessments in order to be aware of potential risks and ways in which these can be minimised
- Check all equipment is safe to use and in good working order
- Wearing appropriate clothing and footwear, for example, do not wear sandals when using a hoist
- Checking that the environment is safe to enable the correct task to take place, such as making sure floors are not slippery or wet and are free from obstructions.

2.1 The anatomy and physiology of the human body in relation to the importance of correct moving and positioning of individuals

In order to understand the significance of correct moving and positioning, it is important to have a basic understanding of the anatomy and physiology of the human body. The musculoskeletal system is the combination of the muscular and skeletal systems working together and includes the bones, muscles, tendons and ligaments of the body. The musculoskeletal system serves many purposes, it allows our bodies to have shape and posture, but it also allows us to move and it provides protection to our internal organs. Every time we perform a physical movement, including standing, walking, talking, moving position to sit comfortably or carrying out basic tasks like washing, showering or brushing our teeth, we are using our musculoskeletal system. Without it, our bodies would be like jelly and it would not be possible, or would be extremely difficult, to complete many of the tasks we take for granted. If the musculoskeletal system is injured, vulnerable or simply does not work properly, the ability to carry out everyday movements is greatly reduced and can cause a great deal of pain to the individual.
**The spinal column**

The spinal column is made up of bones called vertebrae, in between these bones are joints that connect them together. Ligaments connect the bone to the support joints. If a person is not moved correctly, joints can stretch and ligaments can sprain, causing further pain and discomfort to the individual.

**Muscles**

Muscles are another part of the musculoskeletal system. Muscles are an elastic like tissue which pull bones when we move. Skeletal muscles are made up from fibres that have horizontal stripes when viewed under a microscope. These muscles are known as voluntary muscles as we can choose when to control them, such as to walk, stand or sit. The body also has smooth, involuntary muscles, these are the ones that we cannot control but the nervous system can, such as muscles used in the stomach to help digest food. When a person is moved or positioned, it is important that this happens smoothly as any sudden movement can pull the muscle or tear a tendon, which would cause them pain.

**Bones**

An adult human body has 206 bones. Bones protect our vital organs, such as the skull protecting the brain, rib cage protecting the heart and lungs. Pressure on bones caused by incorrect moving and handling can cause the bones to fracture, hoists and other moving equipment must be used correctly to ensure safety to the individual, which includes using the correct sized sling to reduce the risk of the person falling out. Correct positioning of an individual when sitting, or when using a wheelchair is also important in order for protection of vital organs, for example, if a person is sitting incorrectly, this could cause pressure on the rib cage, which could cause difficulties with breathing.
2.2 Specific Conditions

There are several specific conditions that require extra consideration when moving and positioning an individual.

**Arthritis**

Arthritis is an inflammation of the joint. It causes pain, swelling, warmth and difficulties with movement. Typically, older people suffer from arthritis, but it can be experienced by anyone of any age. A person with arthritis can experience a lot of pain when moving or being assisted to move.

**Osteoporosis**

This condition causes the bone tissue to become brittle, thin and spongy, which results in bones which can easily break. The spine can crumble and collapse. Osteoporosis is commonly associated with post-menopausal women, but it can occur in men, people of a younger age and anyone with an eating disorder. People who have osteoporosis are at an increased risk of breaking bones when being assisted to move. Physical pressure from other people or hoists and slings can put stress on bones and cause them to crumble or fracture.

**Stroke**

The World Health Organisation (WHO) defines a stroke as “An interruption of the blood supply to the brain, usually because a blood vessel bursts or is blocked by a clot. This cuts off the supply of oxygen and nutrients, causing damage to the brain tissue.

People who have had a stroke might have a weakness on one side of their body, this can mean they find it difficult to move or weight bear on that side, this must be taken into consideration when assisting with moving and positioning.

**Cerebral Palsy**

Occurs if the brain develops abnormally or is damaged before, during or shortly after birth, affecting how the brain controls muscles. People with cerebral palsy can experience muscle stiffness, floppiness, uncontrolled movements and/or problems with balance and co-ordination. People with cerebral palsy can also have more difficulties with one side of the body, they may need assistance to move and how they are affected by their condition needs taking into consideration.
Sensory problems

People with sensory difficulties such as blindness might need further reassurance and assistance for them to feel comfortable with what is happening.

Dementia

Dementia is an umbrella term associated with an ongoing decline of the brain and its abilities.

Dementia affects a person’s ability to think, plan, communicate, remember and understand. Cognitive abilities become progressively reduced. People with dementia might not understand what is happening and could display unpredictable behaviour which might put them at risk.

Effective and therapeutic communication should be used to enable the person with dementia and to promote effective and safe moving and handling for everyone’s benefit.

3.1 Carrying out preparatory checks using the individual’s care plan

It is essential to consult the care plan to identify any specific communication needs and advice on ways of meeting these needs.

The service user or their representative will have agreed the general methods when the care plan was produced, but there may be changes and it is still very important to consult with them. This should prevent misunderstandings and enable potential/actual differences to be identified and resolved.

This plan will also tell you what the individual can do for themselves, their limitations, any problems encountered in the past and how often they need to be repositioned.

The plan should be used in conjunction with the risk assessment documentation.

Carrying out preparatory checks using the moving and handling risk assessment

Any person who requires assistance with moving and handling will require a detailed risk assessment. Regulation 4 of the Manual Handling Operations Regulations requires employers to make suitable and sufficient assessment of any hazardous operations that cannot be avoided.
The results of any risk assessments undertaken must be manually or electronically recorded and everyone involved needs to be aware of the health and safety procedures.

All care workers who are involved with moving and handling have a duty to familiarise themselves with the contents of the individual’s risk assessment, in order that they are aware of any identified risks and steps taken to reduce those risks. Within any moving and handling risk assessments there are five areas that need to be taken into consideration. These are:

- Environment
- Load
- Individual capability
- Task
- Equipment.

Risk assessments should be regularly reviewed and updated if necessary to take into account changes in the law and any developments in moving and handling procedures and techniques.

3.2 Identifying any immediate risks to the individual

The basic principles of risk assessments are to:

- Look for and identify hazards
- Decide who may be harmed and how
- Evaluate the risks and decide whether the existing precautions are adequate or whether more should be done
- Record the findings.

3.3 Actions to take in relation to identified risks

Although it is difficult to eliminate risk altogether, the risk assessment process aims to reduce the level of risk to the lowest possible level that is reasonably practicable.
It is important to look at the following in order to **reduce or eliminate the risk of injury** that is associated with the task:

- Does the task actually need to be undertaken?
- What does the task involve?
- What is the purpose of the task?
- What equipment is required to undertake the task and is it available?
- Does the task involve bending, twisting, stooping, reaching or repetitive handling?
- Will the body’s position become unstable?
- Does the task involve holding the load away from the trunk?
- Does the task involve taking the weight on one leg?
- Does the task involve carrying the load for long distances?
- Are there time constraints?
- Is there insufficient recovery time?
- Is additional alternative equipment required?

**Assessing the load**

Assessing the load involves an assessment of the ‘load’ that is going to be moved or handled. This could be an object, a person or an animal. When assessing the load it is important to consider the following factors and aim to establish practical solutions in order to **eliminate or reduce the risk of injury** that may arise from them.

Is the load:

- Heavy, bulky or unwieldy?
- Difficult to grasp?
- Unstable or likely to move unpredictably?
- Harmful, e.g. sharp or hot?
- Awkwardly stacked?
- Likely to move its centre of gravity?
- Too large for the handler to see over?
- With attachments?
- A source of infection or contagious disease transmission?
Assessing individual capability

This is an assessment of the handler’s capability to undertake the task. It is important to consider the following factors in order that steps can be undertaken in order to reduce any identified risks.

Consider the following information:

- Does the manoeuvre require unusual capabilities?
- Does the manoeuvre require particular strength?
- Is specialist training required?
- Is the individual susceptible to injury because of health reasons, for example, health limitations, pregnancy, recovery from previous injuries or returning to work following a period of sick leave?
- Does the clothing of the individual pose a risk?
- Is the handler of a young age?
- Do physical characteristics of the individual prevent safe handling?

Assessing equipment

It is essential that the type of equipment being used is assessed in order to ascertain whether it is safe for the task being undertaken, and to ensure that it is the correct piece of equipment in order to ensure the task is undertaken in a safe manner.

When assessing the equipment being used it is important to establish whether:

- It is safe to use
- It is the correct equipment for the task
- It is well maintained
- It is suitable for the surface it is going to be used on
- The wheels run freely
- It is appropriate for the environment
- It is in good working order.
3.4 Actions to be taken if the individual’s wishes conflict with their care plan

There may be times when a conflict of interest will arise. This may happen if a service user does not agree to be moved in the planned way. If a service user indicates that they do not wish to move, they must never be forced unless they are in immediate danger. If you have been unable to reassure the individual with your explanations and demonstrations, you will need to seek guidance from a senior member of staff or your supervisor.

They may be able to consider alternative methods, but these must be safe and acceptable, and protect the rights of all concerned. A person-centred approach, patience and understanding will help care workers to achieve the end goal.

There may be some underlying reason as to why the individual does not wish to move. Remember that the way in which a service user reacts may sometimes be a response to the approach of the care worker.
3.5 Removing any potential hazards and preparing the immediate environment

This includes an assessment of the environment in which the manual handling will take place. When assessing the environment it is important to consider the following factors and aim to establish practical solutions in order to eliminate or reduce the risk of injury from them. Questions to ask yourself when undertaking an assessment could include the following, will there be:

- Constraints on posture?
- A need to reach or work at height?
- Bumpy, obstructed or slippery floors?
- Variations in levels, for example, slopes?
- Steps or stairways?
- Uncomfortable working temperatures, for example, hot/cold/humid conditions?
- Gusts of wind or other strong air movements?
- Poor lighting conditions?
- Restrictions on movements or posture from clothes or personal protective equipment? (PPE)
- Noise?
- Traffic movement?
- Any other hazards, for example, animals or other people?
- Evidence of poor housekeeping?

Preparing equipment

We have already learned that moving and handling equipment is covered by legislation. Hoists and slings are covered by the Lifting Operations and Lifting Equipment Regulations and other moving and handling equipment is covered by the Provision and Use of Work Equipment Regulations. These pieces of legislation set out the requirements of usage of these pieces of equipment. Under these pieces of legislation care workers have a duty to ensure that any equipment is safe to use. This means that all equipment should be inspected prior to use to check that it is not faulty. Hoists and slings must be officially checked and the result logged by a suitably trained person every six months. Employers usually have a contract with a supplier who will undertake these official checks. It is however still essential that all equipment is checked prior to use.
If you come across a piece of faulty equipment it is essential that it is reported to your supervisor or manager immediately. It must not be used as it could put the service user and care workers at risk. It is far safer that an individual waits a little while or a handling procedure is adapted rather than being exposed to a risk from a potentially unsafe piece of equipment.

3.6 Standard precautions for infection prevention and control and how to apply them

In order to minimise the risk of cross infection that could be caused by intimate contact with the service user, the carer should follow the organisation’s hygiene and infection control procedures. This will involve:

- Washing hands thoroughly before carrying out operations
- Using protective gloves and aprons if identified as necessary by the risk assessment
- Cleaning up spillages
- Cleaning equipment and accessories after use
- Disposing of used Personal Protective Equipment in the correct way
- Washing hands after the operation.

4.1 Confirming the individual’s identity and obtaining valid consent

It is important that you always ensure that you have received consent from the individual prior to any moving and handling procedure.

Give full explanations and explain exactly what will happen and how the individual can assist with the move. Discuss any aids and equipment you propose to use with the service user, explaining their purpose and how they are used, including safety features. Give the individual every opportunity to ask questions and voice concerns. Ensure that you answer questions and address all concerns as they are raised. It is essential to be patient and ensure the individual has understood so check understanding by asking appropriate questions.

Service users will be better prepared, less anxious, and more able to cooperate and participate in the move if they are able to maintain their independence, and be as self-managing as possible.

Advice can also be sought from senior staff.
4.2 Communicating with the individual in a manner which:

- provides relevant information
- addresses needs and concerns
- provides support and reassurance
- is respectful of personal beliefs and preferences.

As with all other aspects of care, communication is extremely important when approaching and carrying out moving and handling procedures. Communication prior to the move is essential in order to obtain the individual’s consent to carry out the move. This is especially important if the person has difficulty in communicating. Every effort must be made in order facilitate understanding. Methods of communication should be appropriate to the individual’s:

- Age
- Level of understanding
- Level of consciousness
- Mental and physical condition.

In communicating with the individual it is important that care workers explain:

- Why they need to move
- Where they need to move to
- What will be involved, especially if the move involves moving and handling equipment
- When the move will take place
- How the move will take place
- Who will be involved in the move and what their role will be.

Clear communication can also help in maintaining independence. It is essential that service users are encouraged to maintain independence for as long as they can. Some care workers may just assume that the individual needs help, when in reality the individual is quite capable of moving him/herself, and likewise, some service users may just assume that the care worker will do everything for them.
Explain the procedure in short manageable-sized chunks, do not give too much information all in one go.

When a person’s needs necessitate the need to be moved or handled they are likely to feel as though they are not in control of their own body and its movement. They may feel frightenened, insecure and unsafe. It is therefore important that an empathetic and reassuring approach is utilised when carrying out any moving and handling procedures with a service user. It is also important to show respect and ensure that dignity is observed at all times. Always treat a person in the same manner that you would wish to be treated yourself.

**4.3 Positioning the individual in accordance with their care plan**

Ensure you are familiar with the service user’s risk assessment and care plan. This plan will include information about how to minimise any potential for pain and discomfort as a result of moving and positioning activities and will have been agreed with the service user.

By following this plan and using the correct and agreed techniques you will avoid any unnecessary discomfort and pain for the individual.

It is essential that all information in relation to the moving and handling of service users is documented and passed on. The person’s plan of care must contain information on the moving and handling needs of all individuals within your workplace. Changes in those needs must also be recorded and passed on. Changes in a person’s condition must never be ignored and must be communicated to a more senior member of staff immediately.

**4.4 Communicating effectively with others involved in the manoeuvre**

It is essential that you communicate effectively with colleagues as well as the service user before and during the procedure. Many moving and positioning activities require teamwork and for this to be effective all team members will need to protect one another’s safety and health.
All those involved should be fully aware of the reason for the activity and should be clear about their role. The team should agree some basic commands that everyone can respond to (for example, ready, steady, lift) and one team member should take a lead in ensuring the task is carried out effectively.

Reflection on the activity afterwards is a valuable tool in enabling improvements for the future.

4.5 Aids and equipment that may be used for moving and positioning

Sometimes people are confused by the terminology (names) of different moving and handling equipment and this does not always help to give a clear indication of what a certain piece of equipment does. The following are examples of moving and handling equipment that is commonly used:

- **Slings**-made from different materials and designed for different usage, for example, there are toileting slings and bathing slings and slings for transferring from chair to bed, etc. or bespoke slings to meet individual personal requirements

- **Stand aids**-can help a person from a sitting to a standing position or some types can be used for short distance transfers

- **Glide/Slide sheets**-helpful when repositioning a person or introducing a sling

- **Belts**-used to assist with short distance transfer; care must be taken in order to prevent a dragging action while using a belt to assist with moving and handling

- **Turn disks**-are for transferring people who have lost their step ability, from one sitting position to another sitting position. It is however, essential that the individual can still fully weight bear

- **Transfer** boards-different designs, shapes and materials all with a unique purpose enabling lateral transfer.

Different types of hoist

There are many types of hoists available and many different manufacturers and styles. However, most hoists work on a similar principle and only differ slightly in their design.
Mobile hoist

Mobile hoists can be either manual or electric and are used to move people from beds to nearby chairs or wheelchairs to car for example. The term does not mean that it is safe to move a person for long distances whilst suspended from a sling attached to a mobile hoist.

Ceiling track hoist

This is a system that is fixed either overhead or wall mounted (also referred to as Overhead Tracking System). Using tracks attached to the ceiling a person can be secured in a sling and moved along a system of rails.

Bath hoist

Not to be confused with bath lifts. The bath hoist is usually a floor fixed piece of equipment that offers either a sling or chair seat to lower the person into a bath.

Standing hoist

These types of hoist are used with individuals who have some degree of upper body strength, good sitting balance and good head and neck control. A person using this type of hoist should be able to follow instructions and remain compliant.

Types of sling

There are a number of different slings available with varying designs and functions. Each person will need to be assessed for the correct sling according to their needs. The most important considerations are the size, type and fabric of the sling.

4.6 Using equipment to maintain the individual in the appropriate position

Care Worker Preparation

The care worker must have knowledge of legislation and understand their responsibilities towards themselves, the individual, their colleagues and the organisation. It is essential that the care worker:

- Knows how to identify and assess risks
- Has received appropriate training on safe moving and handling techniques and
the use of aids and equipment

- Be fully aware of the service user's needs and interests, and the moving and handling techniques / methods considered appropriate for them and contained in the plan of care
- Knows how much assistance is required
- When to ask for help from colleagues. This is particularly important in a community setting, where working alone is common place. Giving individuals too much or too little assistance can create feelings of frustration or cause individuals to lose confidence and independence, and become over dependent on care workers
- Knows how to report any problems.

Service User Preparation

Proper preparation of the individual is essential. They are entitled to this, even if they do not appear to understand or are unconscious. This means that you are recognising all individuals as individuals, with the right to be respected. Also, you, as a care worker, do not know exactly how much information a 'confused' individual may retain, or how much an unconscious individual can hear.

Physical Preparation

Ensure that the individual is wearing comfortable, suitable clothing and safe footwear. Check that there are no loose belts, ties etc, that may become entangled in equipment. Clothing should always preserve dignity.

Privacy and Dignity

Wherever possible (for example in individual's own room, bathroom, toilet etc) close the door and draw the curtains. Always ensure that clothing is arranged so dignity is preserved

Self-Management

Be patient and make sure the individual has understood. Identify and agree the method to be used with them. It is very important to seek the advice of the individual, as well as that of senior staff and to follow the care plan. The individual knows what they are able to do and how they achieve this. This will prevent misunderstandings and enable potential / actual differences to be identified and resolved.
Give full explanations and tell the individual exactly what will happen and how they can assist with the move. Know what support is required and how to give this. Discuss any aids and equipment you propose to use with them, explaining their purpose and how they are used, including safety features.

Give the individual an opportunity to ask questions or voice concerns. This is very useful to identify possible difficulties prior to the move. Allow them to do what they are able for themselves. Make efforts to remove obstacles to communication where there are communication difficulties or differences. Individuals will be better prepared, less anxious and more able to co-operate and participate in the move, if they are able to maintain their independence and be as self-managing as possible.

NB. If at any time during the preparation for the move, your assessment indicates that there is any risk to either the workers assisting the individual to move, or the person themselves, you must seek advice immediately.

Preparing to use the Equipment

Remember, whatever equipment is considered appropriate, you must be fully trained in its safe use. If you are not, you should not use this equipment.

Read and refer to the manufacturer’s instructions. If you have any queries, ALWAYS ask for advice.

- Equipment must be that identified as appropriate during a risk assessment
- Check that powered equipment is in working order and is not damaged in anyway
- In the case of hoists, check the battery is charged
- Ensure that equipment used, is suitable for that individual and where appropriate, they are the correct type and size, e.g. hoists, slings
- Know how to position slings safely, with labels and seams on the outside
- Check plugs and wires are not frayed or damaged and show no signs of scorching
- Check that slings and glide sheets are not frayed or thinning
- Ensure equipment is correctly and securely positioned.
Transferring using Equipment Hoists

- Two care workers are recommended for hoist transfers
- Ensure you are fully trained in the safe use of whichever type of hoist is available in your workplace
- Check that you are using the correct size sling for the individual, with a compatible hoist
- Follow any instructions given in the care plan or available information regarding manual handling procedures
- Know how to position the sling and how this attaches to the hoist
- Correctly position the hoist – this will apply whether the hoist is mobile, fixed or overhead
- Position the chair / bed / wheelchair that the individual is to be transferred to/from, as close as possible, allowing for unrestricted movement of individual and hoist
- Take things slowly and steadily
- Reassure and explain the process to the individual throughout
- In the case of a mobile hoist, adjust the legs (if applicable), position carefully and apply the sling
- When all indicate they are ready, operate the control to lift the individual
- The second care worker can assist by guiding and positioning the individual and warning of any potential hazards. Also indicating and signalling when the individual is correctly positioned and the hoist sling can be lowered
- Check the individual is comfortable
- Take great care not to damage the individual's skin when removing the hoists lings
- Ensure the individual's comfort and safety throughout.
Transfer Boards

An individual may be able to transfer using a curved board which is placed resting each end on the two items of furniture that the person is to be transferred from and to.

Transfer boards can be used by individuals who have the physical and mental ability to slide across the boards using their arms, whilst in a sitting position.

This requires support and instruction from the care worker, who will probably position the board (some individuals can do this), and ensure that brakes are on beds and wheelchairs and that this move is carried out safely.

Transfer boards can also be used to transfer individuals from bed to bed / to trolley. The individual is placed on the board by means of rolling him / her onto the board.

The board is then slid across.

- Never attempt this on your own
- Always seek advice and guidance before use
- Never use the board to lift the individual
- Ensure both bed / trolley etc are of equal height
- Secure brakes.
Chair moves

Before assisting any person to stand from a chair it is essential to establish exactly what they can do for themselves. It may well be that the individual can actually stand independently, but may just need guidance to ensure they are in the correct position to stand. It is important to ensure the individual is sitting in an appropriate chair for their ability. If the chair is too low this may make it more difficult for the individual to stand independently. The person should be instructed to shuffle their bottom forward in the chair, and with the instruction, ready, steady, stand, the individual should use their body’s momentum and push up through their arms and legs.

Sitting down

Encourage the service user to move back until they can feel the chair against the back of their legs. The service user must then feel for the arms of the chair and slowly lower themselves to a sitting position. A Zimmer frame or walking stick may help the individual to support him or herself during this manoeuvre.

4.7 Encouraging the individual’s active participation in the manoeuvre

We all take our independence for granted. It may be extremely difficult for service users to accept that because of ill health, or other contributing factors, that they may need your help in order to move from one place to another, and can no longer enjoy the same level of independence.

The promotion of independence in order to encourage service users to move themselves is the safest method of moving and handling for care workers. Clearly there will be occasions when independent movement will not be suitable and this should be assessed on an individual basis. It is essential to promote independence whilst offering adequate support and this requires thorough, clear and ongoing assessment.

It is also important to remember that some service users will happily let care workers do things for them when they can clearly do these things for themselves.

Always encourage the individual to do as much as possible.
4.8 Monitoring the individual throughout the activity

Checking with the individual concerned during the procedure will help to ensure that you are supporting them in the best way possible. Care workers should always act on any feedback from the individual so that they can ensure they are able to use the required techniques with confidence and competence.

Observational skills are also important, especially when the person is not able to communicate with the carer.

The activity should be halted if any adverse reactions are observed which might include:

- Pain or discomfort
- Evidence of a lack of confidence in the person carrying out the activity
- Lack of, or changes in, the level of co-operation on the part of the individual
- Problems with the equipment being used
- Unexpected movements or loss of balance
- Physical changes in the individual's condition such as a drop in blood pressure, loss of consciousness, or ability to breathe easily.

It can be helpful to ask someone to observe you carrying out the activity in accordance with the care plan and providing you with feedback afterwards.

**REMEMBER** - ensuring the safety of yourself and your service user is of utmost importance.

Recording and reporting the activity noting when the next positioning manoeuvre is due

For a person who requires regular repositioning, it is important to record the time and date of any repositioning so that others will be aware that this has taken place. The care plan should be updated, signed and the time noted on each occasion. Should a person develop a pressure sore, for example, the care workers need to be able to demonstrate that every care has been taken to prevent this occurring by repositioning the person in accordance with the care plan and any changes noted during previous procedures.

There may also be changes observed and information gained during a manoeuvre and this should be shared with everyone involved with the care of the individual. Any such
changes noted or different techniques used that are recorded in the care plan should also be reported to the supervisor.

All information recorded should be:

- Clear and easily understood
- Accurate
- Signed and dated.

### 5.1 When to seek advice and/or assistance in relation to moving or positioning an individual

Many moving and handling procedures will require the assistance of another person, it will be clear from your organisation's policy and the person's care plan that another person is required in order for the procedure to be carried out safely. Whether you are working alone or with another person, there will be additional times when assistance or advice from others is needed. It is important to seek advice or assistance to ensure the safety of everyone concerned. If you are unsure if you need advice, then this is probably an indication that you do.

Some examples of times you might require advice or assistance include:

- When a care plan states that 2 or more people are required to complete a manoeuvre
- When there is a change in the person's condition that could affect safety of themselves or others
- A change to the environment that affects safety
- The person does not consent to the move or the way it is being carried out
- The person wants to carry out the activity in a way that goes against their care plan
- Equipment is faulty or not available
- You are unsure of how to carry out a task
- You are not trained to deal with the situation or equipment
- Any time you are unsure about anything in a moving and positioning activity.
Remember, it is safer to not carry out the planned moving and positioning activity and to seek advice first. Less harm would come from not moving an individual than moving them when unsure, unsafe or untrained. It would also be illegal under various pieces of legislation to use equipment that is faulty or you are not trained to use, or to not seek assistance when the care plan states you must do so.

Take advice and guidance from the following sources:-

- Colleagues and manager
- Specialist advice, such as from the physiotherapist
- Training courses.

### 5.2 Sources of information available in relation to moving and positioning individuals

There will be times when in order to keep everyone safe, you will need to consult further sources of information in relation to moving and handling. Within your workplace there will be many reliable sources of information you can find, these include:

- Moving and handling guidelines
- Risk Assessments
- Care Plans
- The Individual being cared for and their family
- Colleagues and manager
- Specialist advice, such as from the physiotherapist
- Training courses.

### Conclusion

The information you have read within this unit should increase your knowledge and understanding, which will benefit you, the individuals you care for, key people and others. Now complete the assessment questions for this unit in the workbook section.