



Trial process update February 2024. This replaces the November 2023 process.

In February 2024 a review of the trial process was undertaken in the context of financial sustainability, resulting in the need to reinstate the trial of band 3 equipment as outlined below. This change is effective immediately.

Communication to EMS assessors, and Assistive Technology (AT) suppliers regards changes to the EMS trial process.

Context:

The [Equipment and Modification Services Manual](#) outlines the process for trial of equipment to ensure the most cost-effective solution to meet a person's needs. (Paragraph 5.2, pages 22 & 23; Paragraph 8.2.3, page 38; Paragraph 8.2.6, pages 38; Paragraph 8.6.3, pages 43)

Following feedback from EMS assessors and AT suppliers a review of the process was undertaken to streamline the process, reduce timeframes and mitigate cost of equipment out on trial.

A working group was formed in May 2023 with broad representation from assessors, supplier EMS providers and Whaikaha undertook an in depth look at the trial process, barriers and options to improve the way the trials were delivered to disabled people, tāngata whaikaha, family and whānau.

Summary of the outcome:

The agreed changes were informed by the data relating to the types of trial, the length of trial and the outcome of the trial process.

The data clearly indicated that:

Where types of equipment were successful, across the majority of trials, **the range of equipment requiring trial can be reduced:**

- All band 2 will be purchased.
- *Band 3 equipment will be trialled before purchase.*
- Equipment solutions under \$1000, excl GST will be purchased.
- If they do not meet the needs of your client, return them to the provider and request an alternative solution.

Where types of equipment presented unnecessary barriers in the follow-up process that can be streamlined:

- The Supplier **will** follow up with the EMS Assessor regarding any trials approved that remain outstanding, beyond agreed trial time frame. (*Contact with the team lead by the Supplier in first instance, is preferred*)

- If no trial outcome is advised within the first within **40 working days**, this can be escalated to the EMS Provider. *(They can involve EMS provider earlier if required)*
- The EMS Provider **will** facilitate resolution with the EMS Assessor regarding any trials approved that remain outstanding, with no trial outcome advised after within **40 working days**.

Roles and responsibilities:

Assessor responsibilities:

- Identify solutions for trial or purchase as relevant.
- Manage the trial including provision of necessary education, training, and adjustments.
- *Complete the trial within 20 days unless there is a clear reason for extending.*
- Consider all relevant environments that the equipment is required to be used within.
- Coordinate the return of unsuccessful trial items to the supplier.
- Request trial extension from supplier if additional time is needed to determine suitability.
- Order any additional accessories, modifications, or parts if applicable.
- Confirm the outcome meets long-term essential disability related needs with the person.
- Review quote and where applicable, script form for accuracy.
- completion of process to conclude Service Request within 40 working days – purchase and/or cancellation if needed and submit back to EMS provider, within 10 working days.

Supplier responsibilities:

- Receive trial approval.
- Co-ordinate equipment requirement and configuration with assessor.
- Provide trial equipment and agreed availability timeframe.
- Engage in trial or purchased item set up as required.
- Work with assessor to provide trial of different options, if required.
- Coordinate return of trial items that have been deemed unsuccessful.
- Negotiate with the assessor a trial extension, where required.
- Escalate trial process related issues to EMS provider if indicated.

EMS provider:

- Take receipt of Service Request, EMS Advice and Purchase Request, within **10 working days**.
 - Items approved for trial processed.
 - Stores check to see if item available in Refurbished stock and if available the item is provided to the identified delivery address and assessor notified. Target time of stores check **is 3 working days**.
- or**
- Provide to assessor approval to proceed to trial equipment from a specified supplier(s).
 - Outcome of trial confirmed by assessor.
 - If trial is successful, purchase order issued to supplier.
 - Facilitate resolution with the EMS Assessor regarding any trials approved that remain outstanding, with no trial outcome advised after within **40 working days**.

FAQs:

What is not changing?

The initial trial period of **20 working days**, as per manual will remain the same.

What happens if additional trial time is required?

The EMS assessor should engage with the supplier to ensure trial extension is reasonable and possible. This agreement should be documented between relevant parties.

When does the 20 working days start?

The trial period of **20 working days** starts when the equipment package is ready to be trialled by the client, not necessarily the date the first item within a package solution is received by the assessor.

When would a quote be required?

A quote is not required for any items on the Band 1 / 2 list where the item is for purchase as per Band specifications. A quote is required for any items off list or for items that do not fully align to the List specifications.

Can a trial period issue be escalated within 40 working days?

Yes, it can be escalated to the EMS provider by the supplier if they have not received communication from the assessor as to the status of the trial.

Can I trial list equipment or under \$1000, excl GST?

It will be going back into reissue stock, if not successful, and EMS provider would pick up this type of equipment.