

Stairlift/ through floor lift/Steplift procedure.

	Stage	Date completed
1	Assessment visit(s) completed. Options discussed with the client. Client can visit the DLC to trial stairlifts if required.	
2	Ownership of property confirmed. Permission confirmed from landlord if required. Discuss ongoing servicing and maintenance liability if lift is approved. Record in notes/ Ax.	
3	Senior OT consulted, joint visit if necessary.	
4	Consider getting quote from lift company to check feasibility.	
5	Assessment report written by OT detailing outcome of assessment and recommendations	
6	Complete Sector panel for equipment/ adaptations case note and workflow to local approvals box for review by Senior OT.	
7	Local Adaptations Panel agreement	
8	City panel submission if appropriate and lift part of complex provision (expected costs of £20K or more or setting a precedence).	
9a	Owner occupier-OT emails HIG 1 letter * to the adaptations team and sends a copy to the client.	
9b	CEC property- gain quote from Prism, save in client's file on G drive and place order via ELMS. Proceed to stage 16,19 and 20 only.	
9c	Housing association- complete Stage 3 form with detailed information of what is required and send to them. End involvement if no other issues.	
10	Customer completes HIG application form and returns to adaptations team who then sends grants letter out confirming % entitlement.	
11	Client seeks 3 quotes for the lift (with assistance of the OT as required). All quotes should be discussed with OT.	
12	OT completes HIG 2 letter* following confirmation with SOT and sends to Adaptations team and copy to client. Client/OT sends quotes into the adaptations team.	
13	Grants officer writes to client formally approving the grant application based on the suitable quotations.	
14	Client orders the lift directly with their chosen company.	
15	Client advises the OT of the installation date.	
16	Once installed, OT visits to check that installation has been carried out to agreed specifications and it meets the clients needs. OT to get client to demonstrate the use of the lift.	
17	OT completes HIG 3 letter * and emails it to the Adaptations Team, copy sent to the client.	
18	Client sends in the invoice to adaptations team who will arrange grant payment to be released.	
19	OT to make sure client is clear about who maintains, services and repairs the lift.	
20	OT clearly records in closure summary who is responsible for maintenance and repair of lift.	

* indicates a standard letter is used.