



Provide Technical Services

Occupational
Standard Title

OBTAIN, EVALUATE, AND RECORD EQUINE DETAILS, AND HISTORY

Overview

This standard covers the recording of horse signalment, physical attributes and history. It is critical to record clear, concise, and full notes at each visit so that your client, you, and other practitioners may consult them and track changes over time. Records will be examined in the case of complaint.

You should follow a system during your appointment so that no step in acquiring data is missed. This system must reflect your speciality area/s, training and qualification, any data collection requirements of a saddlery or lornery supplier, and codes of conduct and practice to which you adhere.

You must know how to recognise and record information from commonly issued documents. You must listen to your client and any other relevant party, check understanding, and accurately record information. You must identify areas that may be significant to your work as an Equine Fitter and be able to explain to your client the purpose of collecting data.

Depending on your findings it may be necessary to cease your fitting appointment and recommend next steps to your client.

You may also refer to:

- LANCS68** Work within professional, legislative, and regulatory requirements for animal health and welfare
- LANCS4** Establish and maintain working relationships
- LANEHC9** Assess and manage equine behaviours
- LANCS69** Monitor and maintain health and safety when working with horses
- EFCTS02** Assess, evaluate, and record horse conformation, condition, and gait



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Performance Criteria

You must be able to:

- P01 Present yourself in a professional manner
- P02 Listen attentively to the client, check your understanding, and record relevant detail
- P03 Recognise and describe features for positive identification
- P04 Identify and interpret relevant documentation
- P05 Perform and repeat data collection procedures
- P06 Work safely around the horse with respect for their welfare
- P07 Explain to your client and other equine professionals how information is collected, recorded, and used
- P08 Communicate the significance and consequences of data collected to the fitting and the fitting process



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Knowledge and understanding

Professional standards of dress and behaviour

You need to know and understand

K01	How to dress and present yourself correctly
K02	How to introduce yourself, and establish the boundaries of your engagement
K03	How to establish a rapport with your client and others
K04	The scope (and limits) of your role, training, and expertise

Work safely around the horse

You need to know and understand

K05	Behavioural indicators in the horse so that your behaviour may be adjusted to avoid stress or discomfort
Scope and range	<ul style="list-style-type: none"> • Understand how to use ridden and unridden horse ethograms • Feedback from the handler or guardian • Your experience of horses, and/or of this horse
K06	Appropriate protective clothing and equipment
Scope and range	<ul style="list-style-type: none"> • Ensure you have correct protective equipment in good condition <ul style="list-style-type: none"> ◦ Footwear ◦ Long sleeves and trousers where possible • Minimise jewellery and ensure hair is neat

Take and record objective information

You need to know and understand

K07	How to verify and record horse signalment
Scope and range	<ul style="list-style-type: none"> • Breed, age, sex • Using observation and veterinary records



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K08 Which other identification information to collect

Scope and range

- Name, stable name, age, height, breed/type, colour, markings, acquired markings such as scars and brands, microchip

K09 Types of documents used to identify or describe the horse

Scope and range

- Passports, breed certificates, photographs, video, veterinary records, microchip record
- Cross-check against other records and observation
- How to transcribe to your records

K10 How to describe horse appearance using appropriate veterinary and technical terminology

Scope and range

- Name, stable name, age, height, type, coat colour, hoof colour, markings, acquired markings such as scars and brands

Take and record history

You need to know and understand

K11 How to take and record an accurate and full clinical history

Scope and range

- Veterinary history of injury, lameness, sickness
- Other healthcare history, such as
 - Dental history or records
 - Musculoskeletal history or records
 - Foot care history or records

K12 Other aspects of history or care pertinent to fitting

Scope and range

- Concerns about working the horse relating to saddlery or livery
- Themes of feedback from coaches, trainers, or primary guardians
- Established routine or changes in management including:
 - Herd and companionship
 - Handler, rider, or surroundings
 - Turnout
 - Nutrition
 - Exercise type, frequency, intensity



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Following procedure and operating within a system

You need to know and understand

K13	Which steps are taken and in what order, and why adhering to a system is important
Scope and range	<ul style="list-style-type: none"> • The system and procedures underpinning your training and/or qualification • Why one step should precede or follow another • Additional data reasonably required by equipment suppliers, and when in the process and how this data is collected • Why physical/digital data collection methods (forms) should reflect and guide the appointment
K14	The importance of consistent use of terminology
Scope and range	<ul style="list-style-type: none"> • Effective and efficient communication with paraprofessionals and other Equine Fitters • Consistent record keeping • Be confident that information has been transmitted as intended – preventing misunderstanding <ul style="list-style-type: none"> ◦ Between fitter and guardian ◦ Between fitter and paraprofessional ◦ Between fitter and supplier of goods

Evaluating and communicating findings

You need to know and understand

K15	How to evaluate the data collected
Scope and range	<ul style="list-style-type: none"> • Understand the purpose of collecting data • Place data in context • Use data to guide future expectations
K16	Record and share verbal and written information
Scope and range	<ul style="list-style-type: none"> • Record and store data securely • Ensure the client understands and signs relevant forms



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