



Provide Technical Services

Occupational
Standard Title

OBTAIN, EVALUATE, AND RECORD CLIENT HISTORY AND ASSESS REQUIREMENT

Overview

This standard is about how to gather, assess, and record pertinent information about the person or persons who ride, drive, or otherwise work the horse.

The Equine Fitter should be able to recognise and clearly communicate any characteristics that may indicate special requirements.

They should assess the equestrian in the context of the intended equestrian activity, availability, and compatibility of saddlery and lornery, and the welfare of the horse.

You may also refer to:

- dEFCTS01 Obtain and record equine history, templates, and other objective data
- dEFCTS02 Evaluate conformation and gait, and carry out basic soft-tissue assessment
- dEFCTS04 Assess saddlery, lornery and other equipment for faults and suitability
- dEFCTS05 Select and fit the saddle, bit, bridle, harness, and/or other equipment
- dEFCC02 Discuss fitting approach and likely outcomes, and make referrals



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Performance Criteria

You must be able to:	P01	Present yourself in a professional manner
	P02	Listen attentively to the client and other relevant parties, check your understanding, and record relevant detail
	P03	Perform and repeat data collection procedures
	P04	Demonstrate and use an appropriate depth and breadth of understanding of human anatomy, physiology, movement, behaviour, and pathology
	P05	Plan to meet equestrian requirements in the interest of their comfort, safety and confidence and the welfare of the horse
	P06	Explain to your client and other equine professionals how information is collected, recorded, and used
	P07	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	How to describe the process with your client, reasons to perform each step, and possible outcomes
K05	How to record information physically or digitally
Scope and range	<ul style="list-style-type: none"> • Structure forms to reflect correct method and sequence • Input concise, correct, clear, and legible data
K06	What safeguarding is and what it means to your work
Scope and range	<ul style="list-style-type: none"> • Protecting health, wellbeing, and human rights • Children, young people, and vulnerable adults
K07	Techniques used to guide clients or equestrians through potentially difficult areas of questioning or discussion
Scope and range	<ul style="list-style-type: none"> • Motivational interviewing • Three-talk model

Human anatomy, physiology, and movement

You need to know and understand

K08	Human anatomy
Scope and range	<ul style="list-style-type: none"> • Skeletal anatomy • Key muscles and muscle groups
K09	Range of healthy movement



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Scope and range	<ul style="list-style-type: none"> • Symmetry • Proportion • Posture
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Equestrian requirements

You need to know and understand

K10	Who works the horse and their main activities
Scope and range	<ul style="list-style-type: none"> • All equestrians should be present, consulted and assessed • Preferences – activities and riding/driving style
K11	Equestrian level of experience
Scope and range	<ul style="list-style-type: none"> • What works well for them and the horse • Areas of concern <ul style="list-style-type: none"> ◦ Training or performance issues ◦ Confidence issues ◦ Discomfort or pain related • Themes of feedback from coaches or trainers
K12	Short-, medium-, and long-term plans
Scope and range	<ul style="list-style-type: none"> • Short-term aims such as competition • Longer-term, more holistic aims • Other variables to consider <ul style="list-style-type: none"> ◦ Change of equestrian ◦ Change in horse management ◦ Retraining for new equestrian activity ◦ Increasing or decreasing frequency or intensity of training in any physical activity

Requesting equestrian history

You need to know and understand

K13	Major injuries or surgery
Scope and range	<ul style="list-style-type: none"> • Healing or recovery



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		<ul style="list-style-type: none"> • Asymmetries related to injury or surgery
K14	Chronic conditions	
Scope and range		<ul style="list-style-type: none"> • Types of condition <ul style="list-style-type: none"> ◦ Physical ◦ Cognitive, e.g., anxiety • Potential implications for equestrian activities
K15	Work and leisure pursuits relevant to fitting	
Scope and range		<ul style="list-style-type: none"> • How types of physical activity influence movement patterns • How to recognise asymmetry, strength, or weakness • Be able to evaluate potential impact when riding or driving
K16	Equestrian experience, skill, and style	
Scope and range		<ul style="list-style-type: none"> • Level of skill and knowledge <ul style="list-style-type: none"> ◦ Of the chosen activity ◦ Equestrianism in general ◦ Horse management ◦ Horse behaviour and health • Level of awareness and openness to learn • Knowledge about riding, driving, and handling the horse • Physical awareness and abilities <ul style="list-style-type: none"> ◦ Balance ◦ Independence of movement

Equestrian conformation and condition for fitting

You need to know and understand

K17	The range of products available to meet equestrian needs	
Scope and range		<ul style="list-style-type: none"> • Features, benefits, and limitations of standard products • How products may be designed or varied to meet certain needs
K18	How to assess equestrian conformation	
Scope and range		<ul style="list-style-type: none"> • Limitations to joint range of motion



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		<ul style="list-style-type: none"> • Symmetry and posture • Areas of strength and weakness
K19	How to assess equestrian condition	
Scope and range		<ul style="list-style-type: none"> • How the needs specific to the equestrian may be accommodated or supported • Fitness to perform chosen activity with chosen equine partner/s • Consider equestrian weight, height, and proportion <ul style="list-style-type: none"> ◦ Likelihood that forces exerted upon the horse will be too great during chosen activity ◦ Influence of skill
Following procedure and operating within a system		
You need to know and understand		
K20	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
K21	The importance of consistent use of terminology	
Scope and range		<ul style="list-style-type: none"> • Effective and efficient communication with paraprofessionals and those holding the same qualification or following the same training • 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 paraprofessionals ◦ Between fitter and supplier of goods



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Recording data

You need to know and understand

K22 Other types of information that should be collected to inform your work

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| Scope and range | <ul style="list-style-type: none"> • Veterinary history of injury, lameness, and sickness • Other healthcare history, such as <ul style="list-style-type: none"> ◦ Dentistry records ◦ Physiotherapy or Chiropractic records ◦ Foot care history or records • Concerns relating to riding or working and the saddlery or lornery, or the horse or client • Themes of feedback from Coaches or Trainers • Photography or video, with client and equestrian permissions |
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K23 How you will store data securely maintaining confidentiality

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| Scope and range | <ul style="list-style-type: none"> • How to design or select appropriate physical or digital methods to collect information • How to cross-reference or link client records taken over time, or in different formats • How to protect data physically (e.g., locks) or digitally (e.g., passwords, encryption) • How to gain permission to share data |
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Evaluating and communicating findings

You need to know and understand

K24 How to evaluate the data collected

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| Scope and range | <ul style="list-style-type: none"> • Evaluate all information collected to this point <ul style="list-style-type: none"> ◦ History and current issues ◦ Conformation, condition, and posture ◦ Relevant dimensions • Identification of themes or correlations • Consider how the combined data reflects the fitting needs of the horse and equestrian |
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- Whether to continue or halt the appointment or phase of the appointment
 - Know which criteria to set before recommencing or rebooking the appointment
 - When to refer the client
- How to communicate your findings sensitively and clearly, and recommended next steps



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Developed by	The Equine Fitters Council Working Group
Comments	Draws on the Saddle Fitting Steering Group Standard 2018
Version number	1
Date approved	-
Indicative review date	January 2028
Validity	Current
Status	Published
Originating organisation	The Equine Fitters Council
Original URN	EFCTS03
Relevant Occupations	Saddle Fitter, Bridle Fitter, Bit Fitter, Harness Maker, Equine Fitter
Keywords	Assessment, conformation, anatomy, condition, skill, plans