



Title: Aids and Adaptations - Sanctuary Scotland Procedure

Business Function: Housing and Property Functions across Sanctuary in Scotland

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General Information

1. Objective of this procedure

- 1.1 This document sets out the steps to be taken by involved staff to effectively and consistently handle requests for aids and adaptations for tenants with a disability.
- 1.2 This procedure provides guidance to staff responsible for handling aids and adaptation queries and requests from tenants, or other members of the household. The procedure aims to outline how Sanctuary Scotland (Sanctuary) will:
 - promote and apply the service in a fair, consistent and transparent manner;
 - assess and prioritise all enquires and applications;
 - complete minor adaptations; and
 - help tenants to access funding for major works.

2. Legislative/Regulatory context

- 2.1 The following legislation, references and sources are relevant to the development and delivery of this procedure and associated policy:
 - [SHGN 2012/04 Procedures for HAG funding of Stage 3 adaptations](#) provides guidance on HAG funding process and eligibility;
 - [Joint Improvement Team Good Practice Guide for the Provision of Major Adaptations 2011](#) provides guidance on how to effectively develop, deliver, manage, and monitor the provision of major adaptations; and
 - [Minor Adaptations without Delay, parts 1 and 2, published by the College of Occupational Therapists \(OTs\) \(2006\)](#) provides guidance on completing adaptations without an OT referral.

3. Responsibilities for implementation

- 3.1 The Director of Sanctuary Scotland and Regional Head of Service – Property (Scotland) are responsible for ensuring staff comply with this procedure and that all necessary measures are in place to implement the associated policy and this procedure effectively.
- 3.2 All staff involved in the aids and adaptations process are responsible for ensuring adherence to this procedure.

4. What's new - what's different?

- 4.1 November 2025 - Formal review, introduced minimal changes, primarily updating roles to align with the revised Property Services structure and providing updated guidance on the process for notifying the National Compliance team (NCT) of new installations.

Detailed Procedures

1. All adaptations

Step	Action	Timescale
1. Accessing the aids and adaptations service	Tenants can access Sanctuary's aids and adaptations services in a number of ways: - telephoning our Customer Hub on the local freephone number (the centre will outline the process to the tenant); - as a direct referral from an OT or other agency; - directly to any member of staff (for example, at a home visit or at the local office); and/or - via the website - www.sanctuary-scotland.co.uk.	
2. Initiate the process	When the tenant, local authority or OT contacts us to request an adaptation this information must be forwarded to the relevant Property Services mailbox (SMCLAdmin.EnquiriesScotland@sanctuary.co.uk) within one working day. The process for the Designated Officers to follow is set out in the flowchart at Appendix 3.	Within 1 working day
3. Minor or major	Guidance on categorising aids and adaptations as major or minor, and on identifying the appropriate funding source is available at Appendix 4. Once the aid or adaptation has been identified as either a minor or major the appropriate process (as outlined below) must be followed.	

2. Minor adaptations

Step	Action	Timescale
1. Raise works order	The Designated Officer for Property Services will raise a minor adaptation works order for completion within 20 days of request to the relevant contractor. Works of a more urgent nature may be prioritised by agreement. Property Hub/Regional team to offer/make a convenient appointment with the service user at the first point of contact. The Designated Officer for Property Services will record details on the medical adaptations contract tracker spreadsheet.	Upon receipt

Step	Action	Timescale
2. Where minor works become part of a major project completed by external contractors	Where it becomes apparent that the minor aids and adaptations works are more extensive, or form part of major works, refer to the section on major adaptations.	
3. Property Services undertake works order or Approved contractor undertake works order	Work assigned to a Property Services operative and completed within 20 days of receipt of request/referral. Property Services operatives are supported by a comprehensive Technical Guide which details relevant measures and weights for consideration when fitting the minor adaptation (See Appendix 2). Work assigned to approved contractor and completed within 20 days of receipt of request/referral.	Within 20 days
4. Upon completion of works	The Designated Officer for Property Services must ensure the medical adaptations contract tracker spreadsheet is updated.	Within 2 days of works completion
5. Satisfaction Survey	A telephone satisfaction survey will be completed by the Business Information Research team for a sample of cases.	

3. Major adaptations

Step	Action	Timescale
1. Initiate the process	If the tenant does not have an OT referral the Designated Officer will advise them to contact their local social work department or health practice.	At first point of contact (where possible)
1a.	In addition, the Designated Officer for Housing Management should look at the options for the tenant. The Designated Officer must: • check availability of adapted properties, if appropriate, prior to joint visit; • consider any re-housing options (as it may prove more feasible to move the tenant to a more appropriate property); and • keep the tenant informed throughout the process.	Within 10 working days of receipt of referral

Step	Action	Timescale
1b.	The OT will provide information on the level of priority for the adaptation. The Designated Officer for Property Services must: • agree suitability and practical issues of request; • identify if building warrant is required; and • determine any minor works which may be carried out quickly to support the tenant in the short-term.	Within 5 working days of meeting taking place
2. Identify Priority where necessary	Decisions on whether major adaptations will be carried out will be made by the Designated Officer for Property Services, based on the information on level of priority provided by the OT.	
3. Approval	The Designated Officer for Property Services must agree the specification to proceed with the works. Where appropriate, the Designated Officers must also: • consider the appointment of an appropriate consultant where more costly/extensive works are required; • gain tenant cooperation in giving contractors access to their home prior to the works commencing (if necessary); • consider Health & Safety Issues; • consider if 'Decant' accommodation is required; • consider whether the adaptation is eligible for capital spend; • complete the application for a building warrant if applicable; and • inform the tenant/OT of any decisions or issues.	Within 10 working days of receipt
4. Communication with tenant and OT	The Designated Officer for Property Services must send letters to the tenant and Occupational Therapist advising them of any relevant decisions and outcomes throughout the process. This will include a letter when the adaptation has been approved, and a letter if the adaptation is likely to be delayed.	
5. Procurement	For adaptations costing up to £15,000, we will use approved contractors in line with standard repairs and maintenance procurement arrangements. Refer to the policy for more details. For adaptations costing over £15,000, a full tendering procedure is required, with tenders being open for acceptance for a period of three months. This requirement is set out by the Scottish Government.	

Step	Action	Timescale
6. Completion of works	The VAT exemption form will be completed by the CSC Aids & Adaptations Team and sent to any external contractors. The Designated Officer must update OneSanctuary with details of the completions.	Within 5 working days
7. Satisfaction Survey	A telephone satisfaction survey will be completed by the Business Information Research team for a sample of cases.	
8. Communication	The Designated Officer for Property Services must advise the relevant Housing Officer to ensure that any changes are made to medical priority if the tenant has a housing application with us.	Within 2 working days of visit
9. Funding	HAG will be claimed by Property Services by completing and returning forms HAG A3 and HAG/Payment to the relevant Grant Provider.	
10. Maintenance	The Designated Officer for Property Services must ensure that any aids or adaptations which have been installed and require servicing (for example, a stair lift, hoist, closomat, or Gerberit toilets) are added to the relevant maintenance/servicing schedule. Any equipment installed that qualifies as lifting equipment such as stair lifts and hoists, must be added to the appropriate maintenance and servicing schedule, including the LOLER (Lifting Operations and Lifting Equipment Regulations) schedule. To add the equipment to the maintenance and servicing schedule, the Designated Officer must notify the NCT Lift Team by emailing LiftTeam.Enquiries@sanctuary.co.uk within seven days. This ensures the asset is logged and maintained in line with regulatory and safety requirements.	
11. Repairs to aids and adaptations	We assume full responsibility for repairing/servicing an aid or adaptation that has been fitted by us or by contractors acting on our behalf. A logged repair must be completed within 7 working days, with particular importance paid to repairs relating to access to toilet, cooking or bathing facilities; or may be considered as an emergency repair where the health and safety of a vulnerable tenant is immediately a concern. Where an aid or adaptation has reached the end of its 'shelf-life' then the tenant can make a further application for a replacement. The tenant must contact us to formally request this work and a decision will be agreed with the Designated Manager for Property Services, with advice	Within 7 working days of receipt of request

Step	Action	Timescale
	from an Occupational Therapist if required. If a stairlift or any form of lifting equipment such as a sling or hoist is installed, the Insurance team must be notified by the Designated Officer for Property Services within 7 working days of completion. The Insurance team ensures that such equipment is inspected in accordance with the statutory obligations. This function is separable from any maintenance or servicing obligations that is undertaken by the Property Services team. To add the equipment to the maintenance and servicing schedule, the Designated Officer must notify the NCT Lift Team by emailing LiftTeam.Enquiries@sanctuary.co.uk within 7 days of installation. This ensures the asset is logged and maintained in line with regulatory and safety requirements.	

4. Adaptations in newly constructed properties (Stage Two adaptations)

Step	Action	Timescale
1. Allocation	When allocations are made to properties under construction, Housing Management employees will inform the Project Construction Officer of any requests for medical adaptations.	At point of allocation
2. OT referral	The Project Construction Officer will arrange for a home visit with the proposed tenant, complete an OT referral form, and send this to the relevant Occupational Therapist.	Within 5 working days
3. Approval	Where the request for an adaptation is approved, the Project Construction Officer will inform the employers agent, the contractor and, where relevant, the architect. The Employers Agent has responsibility for raising work instructions with the contractor.	
4. HAG funding	The Development team has responsibility for raising claims for HAG funding with the Scottish Government.	