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Education/training in rehabilitation nursing in Portugal between 1963 and 2005

A formação em enfermagem de reabilitação em Portugal entre 1963 e 2005 La formación en enfermería de rehabilitación en Portugal entre 1963 y 2005

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#### Abstract

**Background:** The education/training of specialists in Rehabilitation Nursing has undergone successive transformations under the influence of different contexts.

**Objectives:** To describe the evolution of the education/training of rehabilitation nurses in Portugal, considering changes in the content of study plans.

**Methodology:** Documentary collection in the Portuguese Official Journal (Diário da República), with hermeneutic analysis and interpretation of the sources with reference to the specialty of rehabilitation nursing, published between 1963 and 2005.

**Results:** In 1963, the Ministry of Overseas referred to the need of including rehabilitation nurses. The study plan contents of the specialty changed until they consolidated in the Portuguese higher education in 2002.

**Conclusion:** Study plans are greatly influenced by the growing complexity of health services and how the society views the profession. The need to promote the readaptation of people with disabilities has also shaped education/training over the years.

Keywords: nursing; history of nursing; rehabilitation nursing; nursing education

#### Resumo

**Enquadramento:** A formação de especialistas em enfermagem de reabilitação sofreu sucessivas transformações, sob influência de diferentes contextos.

**Objetivos:** Descrever a evolução da formação de enfermeiros de reabilitação em Portugal, tendo em conta as alterações no conteúdo dos planos de estudo.

**Metodologia:** Recolha documental no Diário da República, com análise e interpretação hermenêutica das fontes com referência à especialidade de enfermagem de reabilitação, publicadas entre 1963 e 2005.

**Resultados:** Em 1963 o Ministério do Ultramar refere a necessidade de incluir enfermeiras especialistas de reabilitação. A especialidade sofre alterações no conteúdo programático, consolidando-se no ensino superior português em 2002.

**Conclusão:** Os planos de estudo desenvolvem-se com o contributo da crescente complexidade dos serviços de saúde, bem como da visão que a sociedade tinha da profissão. A necessidade de promover a readaptação de pessoas portadoras de deficiência também moldou o ensino ao longo dos anos.

Palavras-chave: enfermagem; história da enfermagem; enfermagem em reabilitação; educação em enfermagem

#### Resumen

**Marco contextual:** La formación de especialistas en enfermería de rehabilitación ha experimentado sucesivas transformaciones, influidas por diferentes contextos.

**Objetivos:** Describir la evolución de la formación de los enfermeros de rehabilitación en Portugal, teniendo en cuenta los cambios en el contenido de los planes de estudio.

**Metodología:** Recopilación documental en el Diario de la República, con análisis e interpretación hermenéutica de las fuentes con referencia a la especialidad de enfermería de rehabilitación, publicadas entre 1963 y 2005.

**Resultados:** En 1963 el Ministerio de Ultramar mencionó la necesidad de incluir a enfermeros especializados en rehabilitación. La especialidad experimenta cambios en el contenido programático y se consolida en la enseñanza superior portuguesa en 2002.

**Conclusión:** Los planes de estudio se elaboran con la contribución de la creciente complejidad de los servicios de salud, así como de la visión que la sociedad tenía sobre la profesión. La necesidad de promover la rehabilitación de las personas con discapacidades también ha conformado la educación a lo largo de los años.

Palabras clave: enfermería; historia de la enfermería; enfermería en rehabilitación; rehabilitación; educación en enfermería



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### Introduction

The interest in the practice of physical rehabilitation occurred essentially as a consequence of some historical events related to armed conflicts (Aparecida de Souza et al., 2011). In fact, physical and rehabilitation medicine has been recognized as a specialty since 1950, with its growth being driven by the World War II (Amorim, 2010). In the 20th century, the two great wars were the main war events that, together with factors such as the acceleration of the urbanization and industrialization process, led to an exponential increase in the interest in the process of functional recovery and autonomy of people with different types of physical disabilities.

In fact, during the Crimean War in 1859, Florence Nightingale, the major founder of modern nursing, proved the usefulness and efficiency of nursing care in the recovery of wounded soldiers (Aparecida de Souza et al., 2011). In Portugal, rehabilitation nursing developed significantly during the 1950s and 1960s, gaining visibility mainly after the construction of the Rehabilitation Medicine Center of Alcoitão in 1964. It was this Center that, in 1965, offered the first postgraduate training program in rehabilitation nursing led by nurse Sales Luís.

With the higher education reform, in 1994, specialization programs became specialized higher education programs (*cursos de estudos superiores especializados* - CESE; Ordem dos Enfermeiros, 2003).

In 1999, the CESE ceased to exist and the nursing education/training model was reorganized, with the possibility of approving post-graduate specialization programs in nursing (Decreto-Lei n.º 206/1999).

However, the content of the programs that were emerging in Portugal, although they followed the national public health situation and tried to respond to the challenges that were occurring, did not always match. In this context, rehabilitation nursing education/training seems to be associated with the paradigms of each year, as is currently the case with the emergence of chronic diseases.

Therefore, this historical research aims to describe the evolution of the education/training of rehabilitation nurses in Portugal, taking into account the changes in the content of the study plans.

# Methodology

This research study used the historical method and is divided into two phases. The first phase consisted of a documentary search in the database of the Portuguese Assembly of the Republic (AR), which ran from September 2019 to February 2020. The following descriptors were used: nursing, rehabilitation nursing, rehabilitation, and nursing education.

Inclusion criteria were as follows: ordinances and decrees-law of the Portuguese Official Journal (*Diário da República* - DR) published between 1963 and 2005,

with reference to the specialty of rehabilitation nursing. Exclusion criteria were descriptive documents from other specialties or published outside the established time period. The year 1963 was defined for the beginning of the search because it is when the first reference was made to the specialty in DR. The year 2005 was defined for the end of the search because it is when the three main nursing schools – Porto, Lisbon, and Coimbra – had their study plans for the post-graduate specialization programs in rehabilitation nursing approved and published in DR. The search was performed by two independent researchers, who filtered, selected, and classified the documents based on the research objectives to determine the quality and relevance of the sources (Filho et al., 2015).

Although they are not primary research documents because they do not comply with the inclusion criteria, the following documents were included because they are important for the development of the profession and its educational process: Decree-Law No. 480/88 of the Ministry of Health, which establishes the integration of higher education in nursing into polytechnic higher education, and Decree-Law No. 104/98 of the Ministry of Health, which creates the Portuguese Order of Nurses and approves its bylaws.

The second phase of the study consisted of a hermeneutic analysis and interpretation of the previously collected sources.

#### Results and Discussion

The document search in the AR database resulted in the inclusion of 33 documents for analysis that are presented in chronological order in Table 1. This table includes ordinances and Decree-Laws dated between 1963 and 2005. In 1963, the Ministry of Overseas, through Ordinances No. 19718 and No. 20253, changed the constitution of the nursing staff of the Ultramar Hospital, in the midst of conflict, indicating that some of the vacant positions were intended for "instrumentalist or physiotherapy nurses of the current nursing staff of the Hospital and . . . by nurses specialized in orthopedics, rehabilitation. . ." (Portaria n.º 19718, p. 180). These changes in the institution's human resources were usually *reactive* changes, which arose from the need to treat returning war-injured soldiers.

On the other hand, it is interesting to note that the tender for job positions of *2nd class nurses* only required the general nursing program. The tender for job positions of 1<sup>st</sup> class nurse required nurses to perform a practical test, having to be "2<sup>nd</sup> class nurses of the nursing staff of the Ultramar Hospital, considering the length of service with good information in the final classification" (Portaria n.º 19 718, p. 180). In fact, a substantial difference was observed between the access to the 1<sup>st</sup> class category, which required only the qualification, and the access to the specialized 2<sup>nd</sup> class category, which required a practical test and length of service.

**Table 1**Documentary sources in the sample

Name of the document	Author	Summary	Year
Ordinance No. 19 718	MInistry of Overseas; Directorate-general of Health and Care Overseas	It establishes the conditions to which the nursing staffing at the Ultramar Hospital is subject	1963
Ordinance No. 20 253	Directorate-General of Health and Assistance Overseas	It redacts paragraph 3 of Ordinance No. 19718, which establishes the conditions to which nursing staffing is subject	1963
Decree-Law No. 46 448	Ministry of Health and Care	It amends the Regulation of Nursing Schools, approved by Decree No. 38885, and adds in provisions on nursing, social service, and hospital administration courses	1965
Ordinance No. 22 034	Ministry of Health and Care; Minister's Office	It regulates the conditions for the training of specialized technical personnel of rehabilitation services and authorizes Santa Casa da Misericórdia de Lisboa to create, in its Rehabilitation Medicine Center, in Alcoitão, a rehabilitation school	1966
Ordinance No. 34/70	Directorate-general of Hospitals	It approves the General Regulation of Nursing Schools	1970
Ordinance No. 728/73	Ministry of Corporations and Social Welfare	It approves the Statute of Nursing Staff, Medical Technicians and Assistants working at Welfare Institutions	1973
Ordinance No. 780/76	Ministry of Social Affairs; State Secretariate of Social Security	It redacts groups $1.5$ – Of nursing, $1.11$ – Of teaching in rehabilitation school, and $4$ – Of positions to be eliminated, when they vacate, from the staff approved by Ordinance No. 690/74 of 24 October	1976
Decree-Law No. 480/77	Ministry of Social Affairs; Minister's Office	It determines that the Hospital de Sant'Ana, in Parede, and the Rehabilitation Medicine Center, in Alcoitão, become dependent on the Directorate-General of Hospitals	1977
Ordinance No. 343/78	Ministry of Social Affairs	It sets at thirty-six hours per week the working hours of the staff covered by the Statute of Nursing Staff, Medical Technicians and Assistants, approved by Ordinance No. 728/73, of 22 October	1978
Ordinance No. 251/80	Ministry of Social Affairs	It authorizes that sums are withdrawn from the budget of the 1979 exploration of the Sports Pari-mutuel Betting, to be reverted to the granting of scholarships for the training or improvement of medical, nursing, rehabilitation and auxiliary staff in diagnostic and therapeutic services, up to the amount of 6000000\$00.	1980
Decree-Law No. 265/83	Ministries of Finances and Planning, of Social Affairs, and of Administrative Reform	It creates post-basic nursing schools in Lisbon, Porto, and Coimbra.	1983
Decree-Law No. 403/87	Ministry of Labor and Social Security	It establishes the attributions and competencies of the Rehabilitation Centers of Cerebral Palsy of Lisbon, Porto, and Coimbra	1987
Decree-Law No. 480/88	Ministry of Health	It establishes the integration of nursing higher education in polytechnic higher education	1988
Ordinance No. 239/94	Ministries of Education and of Health	It establishes the generic regulation of specialized higher education courses in the area of nursing	1994
Ordinance No. 318/95	Ministries of Education and of Health	It authorizes the Nursing School Dr. Ângelo da Fonseca to verify the specialized higher education degree in Rehabilitation Nursing and approves its study plan	1995
Ordinance No. 1151/95	Ministries of Education and of Health	It creates in the Nursing School Cidade do Porto the specialized higher education course in Rehabilitation Nursing and approves its study plan	1995
Ordinance No. 1414/95	Ministries of Education and of Health	It approves the study plan of the specialized higher education course in Rehabilitation Nursing of the Nursing School Bissaya Barreto	1995
Decree-Law No.161/96	Ministry of Health	It approves the Regulation of the Professional Practice of Nurses	1996
Ordinance No. 490/96	Ministries of Education and of Health	It amends annex I of Ordinance No. 1414/95 of 24 November (approves the study plan of the specialized higher education in Rehabilitation Nursing of the Nursing School Bissaya Barreto).	1996

Ordinance No. 404/97 Ordinance No. 543/97 Ordinance				
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tion and Higher Education to the Fernando Pessoa University and approves its study plan			in Rehabilitation Nursing at the Ponte de Lima Unit of the Fernando	2005

In 1965, the then-called Ministry of Health and Care [Ministério da Saúde e Assistência] suggested a change in nursing education, stating that it "has profoundly changed in recent years worldwide due to new demands resulting from the development of medical sciences and nursing techniques" (Decreto nº 46 448, p. 1023). This document aimed to update the study plans, so that professionals could act in the areas of prevention, treatment, and rehabilitation. It is interesting to note that the concern for rehabilitation practices continues among nurses, being almost a mandatory area for all nurses.

Giving continuity to the ordinances issued by the Ministry of Overseas, which defined the criteria for admission to

a specialized practice, the Ministry of Health and Care, through Decree No. 46 448, gave full technical and administrative autonomy to the official nursing schools, marking an important step in the future education/training. Therefore, the Decree states that "The academic qualifications required for admission to nursing degrees are as follows: . . . d) General nursing or auxiliary nurses nursing assistant degree for specialized nursing or nursing assistant degrees" (Decreto no 46 448, p. 1023). This criterion implies the "9th grade or equivalent, with three years of nursing practice in a suitable service" (Decreto no 46 448, p. 1023).

To this date, nursing specialization is granted with emi-

nently practical requirements.

The needs of nursing staff were continuously felt throughout the 1960s and until the end of the Colonial War, justifying the movement of funds to support training in this area, especially in rehabilitation:

In an attempt to reduce the difficulties of recruiting staff in some services of the Ministry of Health and Care, particularly in the sector of the recovery of the physically disabled patients. . . The Minister of Health and Care is hereby authorized to use the annual amount of 3 000 000\$ of sports pari-mutuel betting funds . . . for the granting of scholarships for the training or further training of medical, nursing, and rehabilitation staff. (Decreto-lei no 46 772, p. 1722)

This was an important step because it guaranteed annual state support for the nurses' training, particularly in the area of rehabilitation.

Despite this concern with the requirement of access to specialized areas and the existence of financial support, with fixed funds, for professionals' training, there was a lack of institutions or specialties capable of properly training professionals. Until then, rehabilitation training was performed in hospitals, but without its own curricular structure, which made it poorly specific.

In 1966, the Rehabilitation Medicine Center of Alcoitão was inaugurated (CMRA; Portaria nº 22 034), whose construction had started in 1956, using the type of funds described in the previous paragraph. The CMRA was the first institution in Portugal to offer specialized rehabilitation training, providing, even today, "unique conditions to offer the courses and the internships required for the training of technical personnel specialized in rehabilitation" (Portaria nº 22 034, p. 1064). In this new training center, specialization courses in rehabilitation nursing only accepted candidates with the general nursing degree. Therefore, this ordinance of the Ministry of Health and Care authorized the Santa Casa da Misericórdia of Lisbon to create its own rehabilitation school.

Four years after the inauguration of the CMRA, the Directorate-General for Hospitals (*Direção-Geral dos Hospitais*, DGH), similarly to the Ministry of Health and Care, insisted that "nursing education has been, from our perspective, a sector with an undeniable capacity to evolve" (Portaria no 34/70, p. 58). In addition, it is interesting to note that the DGH started comparing education in Portugal with the education abroad, aiming for the country to be at the forefront. This requirement is also the result of the knowledge and training programs imported, in particular, by Nurse Sales Luís, who developed her studies in the United States of America.

Despite major improvements in teaching and practice, the DGH highlighted two factors that kept nursing from developing faster: the general level of education in Portugal and the need to meet the services' demands. These obstacles were overcome over the years by the greater educational offer and the greater technological investment in hospital institutions.

In 1978, the Ministry of Social Affairs, with Ordinance No. 192/78, increased the budget for scholarships for

the training or further training of medical, nursing, and rehabilitation staff to 3 070 000\$. In 1980, this figure rose to 6 000 000\$. It is interesting to note that state funds followed not only the training needs but above all the demands and quality of the associated courses and institutions

The technological evolution being introduced in health institutions, including computed tomography in 1961 or magnetic resonance imaging in 1973, required preparing nurses capable of providing more complex care. In fact, in 1983, Decree-Law No. 265/83 of the Ministries of Finance and Planning, of Social Affairs, and of Administrative Reform, created post-basic nursing schools in Lisbon, Porto, and Coimbra that began to teach several specialization courses. The specialization course in rehabilitation nursing of CMRA was integrated in the Lisbon school. Once again, in 1988, the Ministry of Health, former Ministry of Health and Care, recognized the significant development of nursing education, following international, particularly European, standards. Decree-Law No. 480/88 integrated nursing education into the national education system at the level of polytechnic higher education, and is now taught in nursing schools, while providing for the creation of specialized higher education courses (cursos de estudos superiores especializados, CESE).

In 1994, with Ordinance No. 239/94 of the Ministries of Education and of Health, specialized higher education degrees in nursing were created, including rehabilitation nursing. With the approval in all course units (UC) of the study plan, the course led to obtaining the bachelor's degree in the area of study, and the admission requirements were the *bacharelato* in nursing and two years of professional experience.

The CESE in rehabilitation nursing was a two-year course. Analyzing the study plans of the schools of Porto, Lisbon, and Coimbra, it can be concluded that the UC of Research was included in all study plans, and in Porto (Portaria no 1151/95), in the Nursing School Maria Fernanda Resende (Portaria nº 367/97), and in the Nursing School Bissaya Barreto (Portaria nº 1414/95), this UC was divided by the two years, and in the Nursing School Dr. Angelo da Fonseca (Portaria nº 318/95), it was a first-year UC. By analyzing the documentation prior to 1995, when the first study plans were published in the DR, there is no direct reference to the need for research and the possible inclusion of topics such as fundamental nursing and epistemology also in rehabilitation. It is clear that, as mentioned above, the increasing complexity of clinical, service, and patient needs, as well as the complexity resulting from the application of new technologies to health care, motivates the enhancement of the study plan with these topics. It is interesting to note that in all study plans there is already concern about management and pedagogical skills, being reflected in UCs of various names: Administration and Internship of Nursing Services Administration (Nursing School Dr. Angelo da Fonseca), Health Services Management I and Health Services Management II (School of Porto), Management (Nursing School Bissaya Barreto), and Management (Nursing School Maria Fernanda Resende). Only the Nursing

School Dr. Ângelo da Fonseca included a mandatory management/administration internship. Or, in the case of pedagogy, in a transversal way, UCs such as *Pedagogy* or *Adult Training*. The concern about this type of skills, somehow secondary to the rehabilitation specialty, was a response to the incentive given by the Directorate-General of Hospitals, from the 1970s on.

The first study plans of the specialty, published between 1995 and 1996, presented some heterogeneity, which demonstrated the ongoing process of discovery and construction of the specialty. For example, only the School of Porto offered an UC of Biostatistics and Epidemiology (Portaria nº 1151/95). On the other hand, the subject of disability, as a core area of rehabilitation nursing practice, is only explicitly mentioned in the study plans of the School of Porto, reflected in two first-year UCs (*Psychosomatics* and Disability and Environment and Disability) and in a second-year UC (Ethics and Disability), and of the Nursing School Ângelo da Fonseca, with a second-year UC named *People with Disabilities.* This is, in fact, an important precedent for the maturation of the rehabilitation discipline because, nowadays, physical-motor rehabilitation is an increasingly important component in the care of people with limitations caused by stroke, spinal cord injury, or even traumatic brain injury (Andrade et al., 2010). This school of Coimbra was, also, the only one that included an UC of Anthropology and Health Sociology.

In general, all study plans offered theoretical and practical training, focusing on disciplines such as human anatomy and physiology, although the Nursing School Dr. Ângelo da Fonseca was the only one that specified the names of the musculoskeletal, nervous, respiratory, and neurotrauma system, for example.

The school of Porto, the Nursing School Bissaya Barreto, and the Nursing School Maria Fernanda Resende had general denominations like *Rehabilitation Nursing I*.

In 1996, the Ministry of Health, with Decree-Law No. 161/96, continued to focus on the important growth of nursing, stating that "nursing in Portugal has evolved, in recent years, both in terms of its basic training and in terms of the complexification and dignification of its professional practice" (p. 2959). In this sense, the ministry approved the Regulation of the Professional Practice of Nurses, indicating that the professional practice in nursing requires obtaining a license issued at the time by the Professional Association of Nurses.

After Porto, Lisbon and Coimbra, the city of Braga created in 1997 its first CESE in Rehabilitation Nursing, with Ordinance No. 404/97 of the Ministry of Education and Health, and the city of Viana do Castelo, with Ordinance No. 543/97 also from the same ministry. In both cases, the study plans maintained a two-year structure, including the UC of Research throughout the course. The School of Braga followed the logic of the Nursing School Dr. Ângelo da Fonseca, specifying the thematic areas of the specialty in each UC. The School of Viana do Castelo maintained, like Porto, Bissaya Barreto or Maria Fernanda Resende, a generic denomination like *Rehabilitation Nursing I* or *Rehabilitation Nursing II*. The concern about management and pedagogical skills, with a view to train professionals

able to lead, manage and teach, remained in both schools. It is interesting to note that the School of Viana do Castelo included an UC of *Communication, Innovation and Change*, which corresponds to a disruption in the study plants presented so far.

The inclusion of contents specifically related to *the person with disabilities*, was very important because it contributed to training professionals to cope with complex situations. In addition, the inclusion and readaptation of the person in society became a relevant issue, extending itself beyond the exclusively medical perspective that focused on the body's functionality and systems.

In this sense, in 2001, for instance, the Regional Government of Madeira approved the organic structure of the Regional Directorate for Special Education and Rehabilitation (Decreto Regulamentar Regional no 28/2001/M) which, among other things, ensures the socio-family integration of children, young people, and adults with disabilities, through special intervention methods. This body was composed of, according to the document, six nurses for provision of health care and administration. The need to have a body of rehabilitation nurses was not specified, accepting generalist nurses, which also demonstrates that the specialty would play, over the years, a greater role.

An important step for the growth of rehabilitation nursing was the approval of the General Regulation of Specialization Pot-graduate Degree in Nursing (Portaria nº 268/2002), which already expressly stated that the courses aim to ensure the acquisition of scientific, technical, human and cultural skills appropriate to the specialty. From this moment on, the CESE began to transform into post-graduate specialization degrees, which can be created in non-integrated polytechnic higher education institutions or in organic units in the health area where there is an undergraduate nursing course in operation. Post-graduate courses in rehabilitation nursing began to emerge in various regions of the country, already with more or less homogeneous study plans. In 2004, the courses were approved for the Nursing School São José de Cluny and the Nursing School of Porto (Portaria nº 1306/2004; Portaria nº 1518/2004). In 2005, the courses were approved for the Nursing School Bissaya Barreto, the Schools Artur Ravara, Calouste Gulbenkian, Francisco Gentil, and Maria Fernanda Resende (Portaria nº 42/2005; Portaria nº 296/2005), the Higher School of Nursing of the Polytechnic Institute of Viseu (Portaria nº 302/2005), and the Ponte de Lima Unit of the Fernando Pessoa University (Portaria nº 442/2005).

In fact, according to Schoeller et al. (2018), the nursing specialty is currently consolidated. However, there are still some gaps in knowledge, usually overcome by research and innovation in practice, which justifies, in some way, the insistence on training nurses with knowledge in these two areas.

### Conclusion

The development of the rehabilitation nursing specialty seems to have began as a reaction, although slow, to the need to care for people with injuries resulting from war conflicts. In this sense, governmental bodies saw the need to include in the professional health staff nurses specialized in orthopedics and rehabilitation. In 1965, still relatively early, the former Ministry of Health and Care began to promote a greater appreciation of the profession, so it proposed an improvement in training. With this incentive, the educational qualifications for access to specialty courses in post-basic schools started to require practical tests. At the same time, the state decided to allocate public funds to support nursing education, specifically in the area of rehabilitation. In 1988, there was an important change when nursing education was integrated into the national educational system, at the same time that CESE were created.

Since the first study plans there is a concern about the training of professionals able to cope with more complex situations, something that the DGH manifested as early as 1970, after the inauguration of the CMRA. In this sense, the study plans included UCs like *Research* and *Management*. For the other disciplines, there was a certain heterogeneity between study plans, from generic denominations in the area of rehabilitation to more specific UCs. From 2002 on, with the approval of the regulation that allowed the transition from CESE to post-graduate specialization degrees, several courses of the specialty emerged in various parts of the country.

Limitations of this study include the fact that documentary sources are based solely on DR, which may limit the richness of the study, which could include official school documents. On the other hand, available documents begin in 1963, excluding the analysis of the previous history, which is quite rich. In this sense, the authors suggest that future studies should focus on the influence of military history on the specialty; conduct a detailed comparative analysis of the study plans of each school; and explore the possible influence of the suggestions given by Florence Nightingale in 1859 for the design of rehabilitation interventions for the war-wounded.

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