



AMSPAR

Level 2 Certificate/Diploma in Medical Administration (4419-01)

Qualification handbook

500/6778/3

500/6694/8

About City & Guilds

City & Guilds is the UK's leading provider of vocational qualifications, offering over 500 awards across a wide range of industries, and progressing from entry level to the highest levels of professional achievement. With over 8500 centres in 100 countries, City & Guilds is recognised by employers worldwide for providing qualifications that offer proof of the skills they need to get the job done.

City & Guilds Group

The City & Guilds Group includes City & Guilds, ILM (the Institute of Leadership & Management) which provides management qualifications, learning materials and membership services, NPTC which offers land-based qualifications and membership services, and HAB (the Hospitality Awarding Body). City & Guilds also manages the Engineering Council Examinations on behalf of the Engineering Council.

Equal opportunities

City & Guilds fully supports the principle of equal opportunities and we are committed to satisfying this principle in all our activities and published material. A copy of our equal opportunities policy statement is available on the City & Guilds website.

Copyright

The content of this document is, unless otherwise indicated, © The City and Guilds of London Institute 2009 and may not be copied, reproduced or distributed without prior written consent.

However, approved City & Guilds centres and learners studying for City & Guilds qualifications may photocopy this document free of charge and/or include a locked PDF version of it on centre intranets on the following conditions:

- centre staff may copy the material only for the purpose of teaching learners working towards a City & Guilds qualification, or for internal administration purposes
- learners may copy the material only for their own use when working towards a City & Guilds qualification

The *Standard Copying Conditions* on the City & Guilds website also apply.

Please note: National Occupational Standards are not © The City and Guilds of London Institute. Please check the conditions upon which they may be copied with the relevant Sector Skills Council.

Publications

City & Guilds publications are available on the City & Guilds website or from our Customer Relations department at the address below or by telephoning +44 (0)20 7294 2850 or faxing +44 (0)20 7294 2405.

Every effort has been made to ensure that the information contained in this publication is true and correct at the time of going to press. However, City & Guilds' products and services are subject to continuous development and improvement and the right is reserved to change products and services from time to time. City & Guilds cannot accept liability for loss or damage arising from the use of information in this publication.

City & Guilds

1 Giltspur Street

London EC1A 9DD

T +44 (0)20 7294 2800

F +44 (0)20 7294 2400

www.cityandguilds.com

centresupport@cityandguilds.com

Level 2 Certificate/Diploma in Medical Administration (4419-01)



www.cityandguilds.com
August 2009
V1.3 (June 2011)

City & Guilds
Skills for a brighter future



www.cityandguilds.com

Contents

1	About this document	7
2	About the qualifications	8
2.1	Accreditation details	8
2.2	Aims of the qualifications	9
2.3	Rules of combination	10
2.4	Sources of information and assistance	12
2.5	Candidate entry and progression	14
3	Centre requirements	15
3.1	Centre, qualification and fast track approval	15
3.2	Resource requirements	16
3.3	Administration, registration and certification	17
3.4	Quality assurance	18
4	Course design and delivery	19
4.1	Initial assessment and induction	19
4.2	Recommended delivery strategies	20
4.3	Data protection, confidentiality and legal requirements	21
4.4	Learning and support resources	22
5	Relationships to other qualifications	23
5.1	Links to National Occupational Standards/other qualifications	23
5.2	Apprenticeship framework	25
6	Assessment	26
6.1	Summary of assessment requirement	26
6.2	Recording forms	29
7	Test specifications	30
8	Units	32
8.1	About the units	32
Unit 1	Medical Terminology (2)	33
Unit 2	Medical Principles for the Administrator	34
Unit 3	Administration Skills in a Medical Environment	42
Unit 4	Communication Skills in a Medical Environment	52
Unit 5	Working in the National Health Service (NHS)	57
Unit 6	Work Experience in a Medical Environment	67
Unit 8	Database Software (1)	77
Unit 9	Presentation Software (1)	79
Unit 9	Presentation Software (1)	80
Unit 10	Word Processing Software (2)	81
Unit 11	Spreadsheet Software (2)	83
Unit 12	Database Software (2)	85

Unit 13	Presentation Software (2)	87
Appendix 1	Drug Classifications	89
Appendix 2	List of Bones	90
Appendix 3	Organs and Systems	91
Appendix 4	Sources of information about level accreditation, qualification and credit frameworks and level descriptors	93
Appendix 5	Obtaining centre and qualification approval	94
Appendix 6	Summary of City & Guilds assessment policies	95
Appendix 7	Funding	97

1 About this document

This document contains the information that centres need to offer the following:

QAN: 500/6778/3 Level 2 Certificate in Medical Administration

QAN: 500/6694/8 Level 2 Diploma in Medical Administration

This document includes details and guidance on:

- centre resource requirements
- candidate entry requirements
- information about links with, and progression to, other qualifications
- qualification standards and specifications

2 About the qualifications

2.1 Accreditation details

Accreditation details

These qualifications are

- accredited by Ofqual at Level 2 of the QCF.

Qualifications and Credit Framework (QCF)

The QCF replaces the National Qualifications Framework (NQF) in England and Northern Ireland, and is intended to replace the regulated pillar within the Qualifications and Credit Framework for Wales (CQFW). It is also intended to align with the Scottish Credit and Qualifications Framework (SCQF). The QCF provides a way of recognising achievement through the award of credit for units and qualifications. Units within the framework are allocated a:

- level to indicate the level of difficulty
- credit value to indicate the size of the unit. 10 hours of **learning time** = 1 credit value.

Learning time is a notional measure of the amount of time a typical candidate might be expected to take to complete all the learning relevant to achievement of the learning outcomes. It differs from Guided Learning Hours (GLH) which represent only those hours a tutor/trainer or facilitator are present and contributing to the learning process because it takes into account all learning relevant to the learning outcomes regardless of where, when and how it has taken place.

The QCF recognises learning by awarding credit each time a candidate successfully completes a unit. Candidates can accumulate and transfer credit achievement over time.

A unit is the smallest part of learning for which credit is awarded. Candidates can also gain credit for full qualifications.

For further information about the QCF, CQFW and the SCQF, please refer to the websites for each country listed at Appendix 4.

2 About the qualifications

2.2 Aims of the qualifications

City & Guilds have redeveloped these qualifications in collaboration with AMSPAR (the Association of Medical Secretaries, Practice Managers, Administrators and Receptionists). They offer a more flexible, unitised and updated suite of qualifications that provide candidates with the understanding, knowledge and skills that will meet the special administration support needs of a range of health care providers such as general practices, dental practices, hospitals, pharmacists, opticians, NHS Trusts and health authorities.

The qualifications have been designed to enable candidates to progress directly into employment within the health care support field or to progress to further study.

The content is based on the main role and responsibilities of a medical administrator/receptionist. Each unit details the knowledge, understanding and skills required to carry out this vital support role in any section of the health services.

Candidates will develop personal and practical skills in how to communicate effectively with patients, visitors and members of the health service team and gain an understanding of hospital and general practice procedures, diary management, filing, the use of office equipment and IT.

Candidates will also develop an understanding of health and safety in the workplace and its impact on the working environment particularly with regard to the hazards relating to the medical field. They will also gain an understanding of and be able to correctly use a range of medical terms, develop an understanding of the principles of medical ethics and etiquette and confidentiality which are essential to fulfilling the role of the medical administrator/receptionist.

Optional units give candidates the opportunity to learn about the structure of the NHS, and to develop an understanding of the range of care providers and how the different sections and departments work as part of the health care team. Candidates will also develop an awareness of the legislation surrounding patient care and patients' rights and the limitations of the administrator's/receptionist's role.

With a choice of IT units candidates can also develop essential, transferable skills to enhance their employability in any health care or general administrative role.

The aims of these qualifications are to:

- meet the needs of candidates who work or want to work as receptionists, administrators, administration assistants, ward and records clerks within any section of the health care sector
- allow candidates to learn, develop and practise the skills required for employment and/or career progression in medical administration
- contribute to the knowledge and understanding towards the related Level 2 N/SVQ in Business and Administration whilst containing additional skills and knowledge which go beyond the scope of the NOS. See the N/SVQ/Qualifications Relationship mapping in 5.1 for further details.
- replace the City & Guilds/AMSPAR Level 2 Intermediate Diploma in Medical Reception (4415-03) which expires on 31 August 2009.
- serve as a technical certificate, part of the Level 2 Business and Administration Apprenticeship framework (level 2 Diploma in Medical Administration only)
- provide valuable accreditation of skills and/or knowledge for candidates, without requiring or proving occupational competence.

2 About the qualifications

2.3 Rules of combination

Rules of combination are used to define the structure of qualifications. The rules of combination specify the credits which must be achieved through a particular combination of units to gain a full qualification.

This section provides information about the full qualifications which may be awarded to candidates successfully completing the required combinations of units and credits as shown in the table below:

Accreditation unit reference	City & Guilds unit no.	Unit title	Mandatory/Optional for full qualification	Credit value
T/501/7414	Unit 1	Medical Terminology (2)	Mandatory	6
J/600/2488	Unit 2	Medical Principles for the Administrator	Mandatory	9
L/600/2489	Unit 3	Administration Skills in a Medical Environment	Mandatory	9
Y/600/2494	Unit 4	Communication Skills in a Medical Environment	Mandatory	7
M/600/2498	Unit 5	Working in the NHS	Optional	8
D/600/2500	Unit 6	Work Experience in a Medical Environment	Optional	5
A/502/4624	Unit 7	Spreadsheet Software (1)	Optional	3
H/502/4553	Unit 8	Database Software (1)	Optional	3
K/502/4621	Unit 9	Presentation Software (1)	Optional	3
R/502/4628	Unit 10	Word Processing Software (2)	Optional	4
F/502/4625	Unit 11	Spreadsheet Software (2)	Optional	4
M/502/4555	Unit 12	Database Software (2)	Optional	4
M/502/4622	Unit 13	Presentation Software (2)	Optional	4

Rules of combination

Level 2 Certificate in Medical Administration

The candidate must achieve a minimum of **31 credits** overall by completing Units 1-4.

Level 2 Diploma in Medical Administration

The candidate must achieve a minimum of **42 credits** overall by completing Units 1-4 (31 credits) **plus** a minimum of 11 credits from any of Units 5-13.

Certificates of unit credit

Certificates of unit credit (CUC) will be issued to candidates for each successfully completed unit, even if the full qualification is not attempted.

Candidates who do complete a full qualification will receive, in addition to their full Certificate/Diploma, a CUC for each unit achieved.

2 About the qualifications

2.4 Sources of information and assistance

Related publications

City & Guilds will provide the following documents specifically for these qualifications:

Publication	Available from
Assessment guide for assessors	www.cityandguilds.com
Information sheet	www.cityandguilds.com
Fast track approval form	www.cityandguilds.com

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***

Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs

- **Events**

Contains dates and information on the latest Centre events.

City & Guilds websites

Website	Address	Purpose and content
City & Guilds main website	www.cityandguilds.com	This is the main website for finding out about the City & Guilds group, accessing qualification information and publications.
SmartScreen	www.smartscreen.co.uk	SmartScreen is the City & Guilds online learning support website. It gives registered subscribers access to qualification-specific support materials.
Walled Garden	www.walled-garden.com	The Walled Garden is a qualification administration portal for approved centres, enabling them to register candidates and claim certification online.

Contacting City & Guilds by e-mail

The following e-mail addresses give direct access to our Customer Relations team.

e-mail	Query types
learnersupport@cityandguilds.com	all learner enquiries, including <ul style="list-style-type: none"> • requesting a replacement certificate • information about our qualification • finding a centre.
centresupport@cityandguilds.com	all centre enquiries
walledgarden@cityandguilds.com	all enquiries relating to the Walled Garden, including <ul style="list-style-type: none"> • setting up an account • resetting passwords.

AMSPAR website

Website	Address	Purpose and content
AMSPAR main website	www.amspar.com	This is the main website for finding out about qualifications offered by AMSPAR, accessing membership information and the discussion forum.

Contacting AMSPAR by e-mail

Please do not send urgent or confidential information to AMSPAR by e-mail.

e-mail	Query types
info@amspar.com	for general enquiries

2 About the qualifications

2.5 Candidate entry and progression

Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking these qualifications. However, centres must ensure that candidates have the potential and opportunity to successfully gain the qualification(s).

Please see section 4 of this document, Course design and delivery, which offers guidance on initial assessment.

The assessment for Unit 6 Work Experience in a Medical Environment, candidates must have access to a work placement in a health care environment where they will have experience of dealing with patients, handling medical records, using the telephone etc, preferably within a hospital or primary care setting, see Unit 6 Notes for guidance for more detailed information.

Age restrictions

This qualification is not approved for use by candidates under the age of 16, and City & Guilds cannot accept any registrations for candidates in this age group. Restrictions apply to candidates under the age of 18 working unsupervised with children. Centres and candidates should be fully aware of minimum age requirements in their home nation and any implications for completing assessments.

Progression

The qualifications provide knowledge and/or practical skills related to the N/SVQ Level 2 in Business and Administration and to ITQ for IT Users.

On completion of these qualifications candidates may progress into employment or to the following City & Guilds qualifications:

- 4404 Level 2/3 N/SVQ in Business and Administration
- 4415 Level 3 Certificate in Medical Terminology
- 4419 Level 3 Certificate in Medical Administration
- 4419 Level 3 Diploma for Medical Secretaries

3 Centre requirements

3.1 Centre, qualification and fast track approval

Centres not yet approved by City & Guilds

To offer these qualifications, new centres will need to gain both **centre and qualification approval**. Please refer to Appendix 5 for further information.

Existing City & Guilds centres

To offer these qualifications, centres already approved to deliver City & Guilds qualifications will need to gain **qualification approval**. Please refer to Appendix 5 for further information.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 2 Intermediate Diploma in Medical Reception (4415-03) may apply for approval for the new Level 2 Certificate/Diploma in Medical Administration (4419-01) using the **fast track approval form**, available from the City & Guilds website.

Centres may apply to offer the new qualifications using the fast track form

- providing there have been no changes to the way the qualifications are delivered, and
- if they meet all of the approval criteria specified in the fast track form guidance notes.

Fast track approval is available for 12 months from the launch of the qualification. After this time, the qualification is subject to the **standard** Qualification Approval Process. It is the centre's responsibility to check that fast track approval is still current at the time of application.

3 Centre requirements

3.2 Resource requirements

Physical resources

Centres must provide access to sufficient equipment in the centre or workplace to ensure candidates have the opportunity to cover all of the practical activities.

Human resources

To meet the quality assurance criteria for these qualifications, the centre must ensure that the following internal roles are undertaken:

- quality assurance co-ordinator and/or internal verifier
- trainer / tutor
- assessor

Staff delivering the qualifications

Staff delivering these qualifications must also be able to demonstrate that they meet the following occupational expertise requirements.

- be technically competent in the area(s) for which they are delivering training. This knowledge must be at least to the same level as the training being delivered.
- have relevant experience in the specific area they will be assessing.
- have credible experience of providing training.

Centre staff may undertake more than one role eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

While the Assessor/Verifier (A/V) units are valued as qualifications for centre staff, they are not currently a requirement for the qualifications.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge of the occupational area and of best practice in delivery, mentoring, training, assessment and verification remains current, and takes account of any national or legislative developments.

Candidate work placements

Candidates must undertake a period of work placement to enable them to complete the assessment for Unit 6 Work Experience in a Medical Environment, see Unit 6 Notes for guidance for further information.

3 Centre requirements

3.3 Administration, registration and certification

City & Guilds' administration

Full details of City & Guilds' administrative procedures for these qualifications are provided in the *Online Catalogue*. This information includes details on:

- registration procedures
- enrolment numbers
- fees
- entry for examinations
- claiming certification.

Centres should be aware of time constraints regarding the registration and certification periods for the qualifications, as specified in the City & Guilds *Online Catalogue*.

Centres should follow all administrative guidance carefully, particularly noting that fees, registration and certification end dates for the qualifications are subject to change. The latest News is available on the website (www.cityandguilds.com).

Regulations for the conduct of examinations

Regulations for the conduct of examinations for online and written examinations are given in *Providing City & Guilds qualifications - a guide to centre and qualification approval* and in the *Online Catalogue*. Centres should ensure they are familiar with all requirements prior to offering assessments.

Retaining assessment records

Centres must retain copies of candidate assessment records for at least three years after certification.

Notification of results

After completion of assessment, candidates will receive, via their centre, a 'notification of candidate results', giving details of how they performed. It is not a certificate of achievement.

Certificates of unit credit (CUCs)

A certificate of unit credit records the successful completion of a unit. Centres can apply to City & Guilds for CUCs at any time after candidates have achieved a unit. They do not need to wait until the full programme of study has been completed.

Full certificates

Full certificates are only issued to candidates who have met the full requirements of the qualifications, as described in section 2.3 Rules of combination.

3 Centre requirements

3.4 Quality assurance

This information is a summary of quality assurance requirements.

Providing City & Guilds qualifications and in the *Centre toolkit* provide full details and guidance on:

- internal quality assurance
- external quality assurance
- roles and responsibilities of quality assurance staff.

Internal quality assurance

Approved centres must have effective quality assurance systems to ensure optimum delivery and assessment of qualifications.

Quality assurance includes initial centre approval, qualification approval and the centre's own internal procedures for monitoring quality. Centres are responsible for internal quality assurance, and City & Guilds is responsible for external quality assurance.

External quality assurance

External quality assurance for the qualifications will be provided by City & Guilds external verification process.

External verifiers are appointed by City & Guilds to approve centres, and to monitor the assessment and internal quality assurance carried out by centres. External verification is carried out to ensure that assessment is valid and reliable, and that there is good assessment practice in centres.

To carry out their quality assurance role, external verifiers must have appropriate occupational and verifying knowledge and expertise. City & Guilds' external verifiers attend training and development designed to keep them up-to-date, facilitate standardisation between verifiers and share good practice.

City & Guilds external verifiers use electronic report forms designed to provide an objective risk analysis of individual centre assessment and verification practice.

External verifiers:

The role of the external verifier is to:

- provide advice and support to centre staff
- ensure the quality and consistency of assessments within and between centres by the use of systematic sampling
- regularly visit centres to ensure they continue to meet the centre and qualification approval criteria
- provide feedback to centres and to City & Guilds.

4 Course design and delivery

4.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualifications. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualifications they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualifications they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

Further guidance about initial assessment and induction, as well as a learning contract that centres may use, are available in the *Centre toolkit*.

4 Course design and delivery

4.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Centres may design course programmes of study in any way that

- best meets the needs and capabilities of their candidates
- which satisfies the requirements of the qualifications.

In particular, staff should consider the skills and knowledge related to the national occupational standards.

City & Guilds recommends that centres address the wider curriculum, where appropriate, when designing and delivering the course. Centres should also consider links to the National Occupational Standards, Key/Core Skills and other related qualifications. Relationship tables are provided section 5 Relationships to other qualifications to assist centres with the design and delivery of the qualification.

Centres may wish to include topics as part of the course programme which will not be assessed through the qualifications.

4 Course design and delivery

4.3 Data protection, confidentiality and legal requirements

Data protection and confidentiality

Data protection and confidentiality must not be overlooked when planning the delivery of this qualification.

Centres offering these qualifications may need to provide City & Guilds with personal data for staff and candidates. Guidance on data protection and the obligations of City & Guilds and centres are explained in *Providing City & Guilds qualifications*.

Protecting identity

It is extremely important to protect the identity of the individuals encountered by candidates in the work setting, eg visitors and patients.

Confidential information must not be included in candidate portfolios or assessment records. Confidential information should remain in its usual location, and a reference should be made to it in the portfolio or assessment records.

When recording evidence for Unit 6 Work Experience in a Medical Environment, candidates are expected in particular to protect the identity of children they may be in contact with in the placement/workplace by disguising their names and that of the placement/workplace.

Images of minors being used as evidence

If videos or photographs of minors (those under 18) are used as the medium to present evidence as part of the qualification, **both centre and candidate** have responsibilities for meeting child protection legislation.

It is the responsibility of the centre to inform the candidate of the

- need to obtain permission from the minor's parent/guardian prior to collecting the evidence
- reasons and restrictions for using photographs or video recordings as evidence
- period of time for which the photographs or video recordings may be kept
- obligation to keep photographs or video recordings secure from unauthorised access
- secure electronic storage requirements of photographs or video recordings
- associated child protection legislation.

Legal requirements

There are no legal restrictions affecting these qualifications other than those already mentioned.

4 Course design and delivery

4.4 Learning and support resources

City & Guilds will provide the following learning and support resources which will be posted on our website.

Resource	How to access
Sample question papers and assignments	www.cityandguilds.com/amspar
Past question papers for Medical Terminology	www.amspar.co.uk
Learning support material for imported IT User units (7266)	www.smartscreen.co.uk

5 Relationships to other qualifications

5.1 Links to National Occupational Standards/other qualifications

City & Guilds has identified the connections to the Level 2 N/SVQ in Business and Administration on the NQF. This mapping is provided as guidance and suggests areas of overlap and commonality between the qualifications. It does not imply that candidates completing units in one qualification are automatically covering all of the content of the qualifications listed in the mapping.

IT units are imported units from the Level 1 and Level 2 suite of the ITQ for IT User qualifications. The accompanying assessments of these units have been fully mapped to the related ITQ unit content.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications. For example, units within a QCF qualification may be similar in content to units in the NQF qualification which the candidate may have already undertaken and this may present opportunities for APL.

These qualifications have connections to the

- Level 2 N/SVQ in Business and Administration

4419 Level 2 Medical Administration units		4404 Level 2 N/SVQ units in Business and Administration
Unit Number/Title		Unit Number
1	Medical Terminology (2)	n/a
2	Medical Principles for the Administrator	110, 201, 202, 209
3	Administration Skills in a Medical Environment	201, 202, 204, 209
4	Communication Skills in a Medical Environment	201, 202, 203, 206, 219, 221, 224
5	Working in the NHS	110, 201, 202, 203
6	Work Experience in a Medical Environment	201, 202, 203, 204, 206, 209, 210, 219, 220, 225

NHS Knowledge and Skills Framework – mapping

Unit	1	2	3	4	5	6	HWB1	IK1	IK2	G3	G4	G5
2	L2		L1				L1					
3					L2			L1	L1			L1
4	L1/2				L1	L2						L1
5		L1/2	L1		L1	L1						
6	tbc											

Contacting the Sector Skills Council/Standards Setting Body

These units were developed by City & Guilds in collaboration with AMSPAR and have the support of the Council for Administration (CfA) and Skills for Health.

Name of SSB/SSC CfA
Address 6 Graphite Square, Vauxhall Walk, London, SE11 5EE
Telephone 020 7091 9620
e-mail info@cfa.uk.com
URL www.cfa.uk.com

Name of SSB/SSC Skills for Health
Address Goldsmiths House, Broad Plain, Bristol, BS2 0JP
Telephone 0117 922 1155
e-mail office@skillsforhealth.org.uk
URL www.skillsforhealth.org.uk

Imported units

Some units in these qualifications have been imported from the National Occupational Standards (NOS) developed by other Sector Skills Councils/Standards Setting Bodies:

Name of SSC e-skills UK
Address 1 Castle Lane, London, SW1E 6DR
Telephone 0207 963 8920
Fax 0207 592 9138
e-mail info@e-skills.com
URL e-skills.com

5 Relationships to other qualifications

5.2 Apprenticeship framework

Apprenticeship frameworks

The Level 2 Diploma in Medical Administration has been approved by the CfA as a technical certificate for the Apprenticeship in Business and Administration (level 2).

These qualifications support the Employment rights and responsibilities (ERR) of the apprenticeship framework.

Full details of the requirements of the apprenticeship framework are available from the CfA website: www.cfa.uk.com

6 Assessment

6.1 Summary of assessment requirement

City & Guilds provides the following assessments:

Unit no.	Title	Assessment no./method	Where to obtain assessment materials
1	Medical Terminology (2)	4419-220 Externally set and marked written test	Follow standard examination entry procedures.
2	Medical Principles for the Administrator	4419-221 Externally set and marked written test	Follow standard examination entry procedures.
3	Administration Skills in a Medical Environment	4419-222 Assignment The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for 4419 assignments.
4	Communication Skills in a Medical Environment	4419-223 Assignment The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for 4419 assignments..
5	Working in the NHS	4419-224 Externally set and marked written test	Follow standard examination entry procedures.
6	Work Experience in a Medical Environment	4419-225 Mini portfolio of work placement evidence eg observation, work products, personal statement, diary.	Assessment guidance is within the unit.
7	Spreadsheet Software (1)	4419-801 (use e-Equals 07 assignment 7266-003) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.
8	Database Software (1)	4419-802 (use e-Equals 07 assignment 7266-004) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.

Unit no.	Title	Assessment no./method	Where to obtain assessment materials
9	Presentation Software (1)	4419-803 (use e-Equals 07 assignment 7266-006) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.
10	Word Processing Software (2)	4419-804 (use e-Equals 07 assignment 7266-022) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.
11	Spreadsheet Software (2)	4419-805 (use e-Equals 07 assignment 7266-023) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.
12	Database Software (2)	4419-806 (use e-Equals 07 assignment 7266-024) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.
13	Presentation Software (2)	4419-807 (use e-Equals 07 assignment 7266-026) The assessment covers all learning outcomes. Externally set assignment, locally marked and externally verified.	Download the current assignment version from the City & Guilds website using required password for e-Equals 7266 assignments.

NB: Only centres who are approved to offer these qualifications will be given access to the live assignments. Passwords can be obtained from our Customer Relations team.

Time constraints

The following time constraints must be applied to the assessment of this qualification:

- All assignments must be completed and assessed within the candidate's period of registration. Centres should advise candidates of any internal timescales for the completion and marking of individual assignments.
- Candidates may retake any examination as per the number of examination series available within their registration period.

Grading and marking

Assessments will be graded Pass, Merit or Distinction for all units excluding unit 6 Work Experience in a Medical Environment which is Pass only. For IT units 7-13 the grading term Credit is used within the related 7266 IT User Level 1 and Level 2 assignment documentation. The use of Merit and Credit is interchangeable.

Recommended grading boundaries for written examinations:

4419-220 Medical Terminology (level 2)

Pass = 70-80% Merit = 81-90% Distinction 91-100%

4419-221 Medical Principles for the Administrator

4419-224 Working in the NHS

Pass = 50-64% Merit = 65-74% Distinction = 75%-100%

These grading boundaries are subject to analysis of question paper performance for each examination series and may be adjusted accordingly.

Assignments

4419-222 and 223

Detailed marking and grading criteria are provided in the marking criteria for each assignment. Candidates must achieve a minimum of 50% in each section to achieve a Pass.

4419-801-807

Detailed marking and grading criteria are provided in the marking criteria for each assignment.

All assignments are internally marked and graded subject to internal and external verification. Sample assignments are available as free downloads from the City & Guilds website .

Simulation

Simulation is not permitted for the assessment of unit 6 Work Experience in a Medical Environment.

Evidence requirements

Detailed additional guidance on evidence gathering is provided within the 4419-01/02 assessment guide for unit 6 Work Experience in a Medical Environment.

6 Assessment

6.2 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence for unit 6 Work Experience in a Medical Environment.

City & Guilds has developed a set of example recording forms specifically for unit 6 Work Experience in a Medical Environment. They are available from the City & Guilds website within the 4419-01/02 Assessment guide.

Although it is expected that new centres will use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre.

7 Test specifications

7.1 Test specifications

The test specifications for units 1, 2 and 5 are below:

4419-220: Medical Terminology (2)

Duration: 1 hour

	Outcome	Question no.	Approx %
1	Structure and meaning of medical terms	1	26
2	Meaning of medical terms relating to the body systems		
3	Meaning of medical terms for the different medical specialities		
2	See above	2	20
1, 2, 3	See above	3	20
1, 3	See above	4	20
4	Meaning of abbreviations concerning drugs and prescriptions	5	14
	Total	5	100

4419-221: Medical Principles for the Administrator

Duration: 2 hours

	Outcome	No. of questions	Approx %
1	Understand the principles of Health Promotion / Preventive Medicine	4	18
2	Understand the principles of infection	6	20
3	Understand the role of the Diagnostic Departments	2	20
4	Understand the principles of medical ethics and medical etiquette	3	15
5	Understand the principles regarding drugs used in medicine	3	15
6	Understand the basic anatomy and physiology of the organs of the human body (including the bones)	2	12
	Total	20	100

4419-224: Working in the NHS**Duration:** 1 hour and 30 minutes

	Outcome	No. of questions	Approx %
1	Know the structure of the National Health Service	2	5
2	Understand the differences between primary care, secondary care and community care	4	30
3	Understand key workplace legislation regarding employment	3	15
4	Understand the importance of personal development	2	10
5	Understand how to maintain health and safety in the workplace	3	15
6	Understand how to maintain the rights of the patient	6	25
	Total	20	100

8 Units

8.1 About the units

Availability of units

For full information on unit 1 Medical Terminology (2) see the 4415-01 Level 2 Award in Medical Terminology qualification handbook, available from the City & Guilds website

www.cityandguilds.com/amspar

For more detailed information on IT units 7-13 see the qualification handbooks for 7266 Level 1 Certificate and Level 2 Diploma for IT Users, available from the City & Guilds website

www.cityandguilds.com

Structure of units

The units in these qualifications are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- credit value
- unit aim
- statement of guided learning hours
- connections to other qualifications
- assessment and grading
- learning outcomes which are comprised of a number of practical and/or knowledge based assessment criteria
- guidance notes.

Unit 1 Medical Terminology (2)

Level: 2

Credit value: 6

Unit aim*

The aim of this unit is to enable the learner to develop a basic knowledge of how to accurately construct, identify and use a specified range of medical terminology.

Learning outcomes

There are **four** outcomes to this unit. The learner will know the:

- Structure and meaning of medical terms
- Meaning of medical terms relating to the body systems
- Meaning of medical terms for the different medical specialities
- Meaning of abbreviations concerning drugs and prescriptions

Guided learning hours

It is recommended that 45 hours should be allocated for this unit. This may be on a full time or part time basis.

Key Skills

This unit contributes towards the Key Skills in the following areas:

- Problem Solving

Assessment and grading

This unit will be assessed by an externally set and marked short answer test graded Pass/Merit/Distinction.

*For full details of this unit and additional guidance on the assessment range see the qualification handbook for **4415-01 Level 2 Award in Medical Terminology** available from www.cityandguilds.com/amspar

Unit 2

Medical Principles for the Administrator

Level: 2

Credit value: 9

Unit aim

The aim of this unit is to equip the learner with specialised medical knowledge of administration in a healthcare environment. It will enable the learner to understand health promotion (HP) and the role of the medical administrator in giving advice on health. They will learn how to maintain a safe and healthy environment through the prevention of infection and how the principles of medical ethics, etiquette and confidentiality apply to medical administration. The learner will also develop an understanding of the work of the pathology and clinical imaging departments and a basic knowledge of drug classification, human anatomy and physiology.

Learning outcomes

There are **six** learning outcomes to this unit. The learner will be able to:

1. Understand the principles of Health Promotion /Preventive Medicine
2. Understand the principles of infection
3. Understand the role and function of the Diagnostic Departments
4. Understand the principles of medical ethics and medical etiquette
5. Understand the principles regarding drugs used in medicine
6. Understand the basic anatomy and physiology of the organs of the human body (including the bones)

Guided learning hours

It is recommended that **70** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 N/SVQ in Business and Administration.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Skills for Health.

Assessment and grading

This unit will be assessed by an externally set and externally marked test graded Pass/Merit/Distinction.

Unit 2 Medical Principles for the Administrator

Outcome 1 Understand the principles of Health Promotion/Preventive Medicine

Assessment Criteria

The learner can:

1. describe the role of Health Promotion (HP)/Preventive Medicine (PM) in the workplace
2. explain the role and limitations of the medical administrator in supporting Health Promotion
3. explain the purpose of screening and diagnostic tests.

Assessment criteria explained

For 1. the learner should be able to

- describe why HP/PM is so important in promoting good health throughout the population eg it keeps the population informed about ways in which they can keep themselves healthy
- describe appropriate methods by which the medical administrator can promote HP/PM in their place of work eg by placing posters on the walls of the waiting rooms
- identify the health problems/diseases/ areas which may be targeted by a HP/PM programme eg diabetes, heart disease.

For 2. the learner should be able to

- explain the role of the medical administrator in giving Health Promotion advice to patients eg:
 - the procurement and display of suitable leaflets and posters
 - tagging medical records so that opportunistic advice can be given by the Dr/Nurse
 - organisation of health awareness days etc
- explain the limitations of the role of the administrator when giving advice to patient eg:
 - the administrator should never offer personal advice to patients but should refer them to the Dr /Nurse or draw their attention to the leaflets/posters which are available
 - all leaflets and posters offering advice to patients should be checked and approved by the GP/Consultant/Practice Nurse
- give examples of the repercussions which may occur if the medical administrator should offer personal advice. The administrator is accountable for their own actions and the overstepping of their role could result in disciplinary warnings or dismissal. The GP/Consultant is liable for the actions of all their employees and any incorrect advice offered by the administrator could result in a complaint or their employer being sued.
- give examples of the advice which may be displayed to individuals in a bid to improve health and prevent the onset of disease in the following areas:
 - **holiday health** eg care of the skin; food and drink; immunisations, safe sex, medications
 - **cardiovascular and pulmonary disease** eg diet/weight, smoking, exercise.

For 3. the learner should be able to

- explain the purpose of screening tests and describe the benefits of carrying them out eg Screening tests may identify disease before the onset of signs and symptoms. This early diagnosis allows treatment to begin at an early stage and so improves the prognosis and prevents complications occurring.
- describe diagnostic/screening tests routinely carried out in each of the following areas:
 - a) maternity services eg weight, blood pressure monitoring, blood tests for anaemia and immunity profiles, urine tests for protein/infections, ultrasound scans
 - b) child health eg: weighing and measuring of the baby, blood test for Phenylketonuria, developmental assessment
 - c) cancer eg: mammography, cervical cytology, Prostatic Specific Antigen (PSA blood test), colon cancer screening

d) cardiovascular and pulmonary disease eg: weight and blood pressure measurement, measurement of lung capacity (spirometry).

Unit 2

Outcome 2

Medical Principles for the Administrator

Understand the principles of infection

Assessment Criteria

The learner can:

1. describe the causes and effects of infection in the body
2. explain how cross infection is controlled in a medical environment.

Assessment criteria explained:

For 1. the learner should be able to

- state the different types of pathogenic micro-organisms eg bacteria, viruses, fungi, protozoa
- describe how pathogenic micro-organisms may enter the human body eg:
 - **inhalation** (airborne/droplet infection)
 - **ingestion** (carried to the mouth via the hands or fomites, taken in when eating or drinking contaminated foods or liquids)
 - **inoculation** (needle stick injuries, use of contaminated needles, injuries which penetrate the skin)
 - **body fluids** (via semen, blood saliva)
 - **via the placenta** (during pregnancy)
- describe the main signs and symptoms which may indicate the presence of infection in the body eg pyrexia, pain, discolouration of the skin, rash, swelling, inflammation, feeling of malaise.

For 2. the learner should be able to

- identify the legislation that governs dangerous/hazardous substances in a medical environment COSHH (Control of Substances Hazardous to Health)
- explain the procedures relating to the collection, labelling and storage of specimens containing body fluids eg:
 - use protective clothing when handling specimens (PPE)
 - store specimens in a safe, appropriate place away from the patient area
 - label specimens fully and accurately
 - ensure tops of containers are secure, etc
- explain the procedure for disposing of clinical and general waste eg: PPE; colour coded bags (black for general waste, yellow for clinical waste); store waste bags appropriately away from patients whilst awaiting collection etc
- explain how sharps should be disposed of eg: needles placed unsheathed into yellow sharps box; box kept away from public; box only two-thirds full
- explain the correct procedure relating to the cleaning up spilt body fluids such as vomit, urine, blood etc, eg: wearing of PPE; use of safety signs; use of specialised cleaning utensils; granules/sand; disinfection; washing of hands
- describe how cross infection can be controlled in the workplace eg:
 - washing of hands between patients
 - use of alcohol gels for staff, patients and visitors
 - using clean or disposable bedding for each patient
 - frequent cleaning of all areas
 - thorough cleaning of medical equipment.
 - segregation of infectious patients
 - use of sterilised, disposable equipment for each patient.

Unit 2

Medical Principles for the Administrator

Outcome 3

Understand the role and function of the Diagnostic Departments

Assessment Criteria

The learner can:

1. describe the function of the Pathology Department including job roles
2. describe the function of the Clinical Imaging Department including job roles.

Assessment criteria explained:

For 1. the learner should be able to

- identify the four main sections of the Pathology Department ie: Microbiology, Haematology, Biochemistry, Histopathology/Cytology
- describe briefly the work carried out in the four main sections of the Pathology Department and give examples of the tests which may be carried out in each section eg:
 - Haematology is the study of blood. Takes blood samples from patients to carry out a range of tests to both diagnose disease and to ascertain progress during treatment eg FBC Full blood count, WCC White cell count. This section is also linked to the 'blood bank' which holds emergency supplies of fresh blood and blood products for use in emergency.
- name the job title and describe the job role of different staff employed in a pathology department eg:
 - Pathologist - in charge of department, reports on findings of tests, carries out post mortems
 - Laboratory technician - sets out equipment, may set up some tests, cleans and safely disposes of equipment after use
 - Scientific Officer – in charge of preparing samples, carrying out tests and reading the results
 - Haematologist – the consultant who is in charge of the investigation and treatment of those with abnormal conditions of the blood.

For 2. the learner should be able to

- name in full the four main sections of the Clinical Imaging Department ie: General/simple X-ray, MRI (Magnetic Resonance Imaging), CAT/CT/ (Computerised Axial Tomography), Ultrasound
- describe briefly the work carried out in the four main sections of the Clinical Imaging Department eg:
 - CAT/CT scans (Computerised Axial Tomography/Computed Tomography). This section of the department takes multiple computerised pictures, at set intervals, across an axis of the body. These pictures form a 3-D image of the body to aid diagnosis. Contrast mediums may be injected to show the blood vessels.
- name the job title and describe the role of different staff employed in the Clinical Imaging/Nuclear Medicine Department eg:
 - Radiographer - Sets up machinery, positions patient and photographic plates to take the x-ray
- explain the ways in which the staff and public are protected from the harmful effects of radiation eg:
 - signs and notices warn the public about the danger of this area
 - staff wear counters to monitor the amount of radiation they receive
 - red lights warn people not to enter the room whilst x rays are being taken.

Unit 2

Medical Principles for the Administrator

Outcome 4

Understand the principles of medical ethics and medical etiquette

Assessment Criteria

The learner can:

1. explain the meaning of medical ethics and medical etiquette and how they may be maintained
2. explain the importance of maintaining patient confidentiality.

Assessment criteria explained

For 1. the learner should be able to

- explain the meaning of medical ethics and medical etiquette:
medical ethics is concerned with the moral code of conduct of healthcare professionals; maintained by preserving life eg:
 - treating people equally without any form of prejudice
 - maintaining patient confidentiality
 - not criticising doctors or colleagues**medical etiquette** is concerned with the social code of conduct; maintained by eg:
 - addressing colleagues correctly eg: Mr/Mrs/Miss etc for those who are FRCS qualified
 - a consultant not seeing a patient unless the patient has been referred to that consultant by their GP.

For 2. the learner should be able to

- briefly explain why patient confidentiality is important eg: to engender trust between the patient and the clinician in the knowledge that anything they tell to the clinician will not be divulged even after their death; to comply with data protection requirements regarding written information about a patient
- describe how confidentiality can be maintained within a healthcare environment eg:
 - do not gossip about a patient anywhere/to anybody
 - do not speak about a patient to colleagues where you can be overheard by others, always carry out necessary discussions in an area away from other patients
 - do not leave information on a computer screen where it may be seen by others. Always keep the screen turned away from patients
 - use a screen saver when not inputting information
 - log off computer immediately after use
 - do not leave paperwork containing patient information on desks or in areas where it can be seen by others, always file patient notes and medical results as quickly as possible
 - check that the original copy is not left in the machine when photocopying patient information
 - always place sensitive information into a sealed envelope when transporting it from one department to another.

Unit 2

Outcome 5

Medical Principles for the Administrator

Understand the principles regarding drugs used in medicine

Assessment Criteria

The learner can:

1. explain the legal requirements of drugs used in medicine
2. describe the classification of drugs.

Assessment criteria explained

For 1. the learner should be able to

- briefly describe the role of the hospital pharmacist eg: dispenses limited supplies of drugs to patients in hospital and on their discharge from hospital; gives advice to clinicians regarding drug dosages and contra-indications
- briefly describe the role and responsibilities of the community pharmacist eg: dispenses prescribed drugs; gives advice to patients on the use of prescription drugs; advises on the use of non prescription drugs and alternative treatments
- name, date and outline the two main acts which control the production, storage and prescribing of drugs in the UK:
 - Medicines Act 1968. This includes all drugs used in medicine. It divides these medicines into three categories GSL, POM and P
 - Misuse of Drugs Act (MODA) 1971 and its subsequent MODA regulations. This Act controls the supply, storage and prescribing of 'drugs of addiction' ie controlled drugs. They are divided into five categories.
- identify the three books/periodicals which give information regarding the drugs/medical dressings licensed for use in the UK eg MIMS (Monthly Index of Medical Specialities), BNF (British National Formulary) and the BP (British Pharmacopoeia)
- explain the meaning of generic and proprietary drug names eg: the generic name is the name of the chemical constituents of the drug as stated in the BNF; the proprietary name is that given by the drug company for marketing purposes.

For 2. the learner should be able to

- correctly name the classification of a drug from its description
- correctly describe the use of a drug from its classification.

See Appendix 1.

Unit 2

Outcome 6

Medical Principles for the Administrator

Understand the basic anatomy and physiology of the organs of the human body (including the bones)

Assessment Criteria

The learner can:

1. identify the main bones and their position in the human body
2. describe the main organs of the human body including their position, function and the related system.

Assessment criteria explained

For 1. the learner should be able to

- identify the main bones of the human body and their position (see Appendix 2). (All that is required is an awareness of the medical name and the location of the main bones.)

For 2. the learner should be able to

- identify the position of the main organs of the body and the body system to which they belong
- describe the function of the main organs of the human body.

See Appendix 3.

Unit 3

Administration Skills in a Medical Environment

Level: 2

Credit value: 9

Unit aim

The aim of this unit is to enable the learner to understand medical administrative procedures, including registration of patients, appointments and appointment systems, the use of office equipment, how to deal with post, filing and repeat prescribing. In addition, they will gain an understanding of how to manage their own workload and the importance of accuracy in the medical environment.

Learning outcomes

There are **seven** learning outcomes to this unit. The learner will be able to:

1. Understand how to manage own work in a medical environment
2. Understand the need for accurate record keeping in a medical environment
3. Understand primary and secondary care registrations
4. Understand medical appointment systems
5. Understand the principles of repeat prescribing
6. Understand general administrative duties in a medical environment
7. Understand what constitutes a team

Guided learning hours

It is recommended that **70** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 N/SVQ in Business and Administration.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration.

Assessment and grading

This unit will be assessed by an externally set and internally marked assignment covering all learning outcomes, graded Pass/Merit/Distinction.

Unit 3

Administration Skills in a Medical Environment

Outcome 1

Understand how to manage own work in a medical environment

Assessment Criteria

The learner can:

1. describe how to manage own work
2. describe the use of a diary in a medical environment
3. explain different types of reminder systems.

Assessment criteria explained

For 1. the learner should be able to

- describe a range of methods to plan and prioritise own work eg: by completing essential tasks first in accordance with instructions; listening carefully to instructions first time round to avoid having to ask again later; building in some flexibility, using planning aids.

For 2. the learner should be able to

- describe how manual and electronic diaries are used in a medical environment:
 - forecasting eg regular clinics/meetings
 - record-keeping eg clinic appointments
 - evidence of work done using task manager
 - reminder of forthcoming events eg to ensure no double-booking.

For 3. the learner should be able to

- describe different reminder systems and explain how they work and when they might be used eg bring forward, tickler system.

Unit 3

Administration Skills in a Medical Environment

Outcome 2

Understand the need for accurate record keeping in a medical environment

Assessment Criteria

The learner can:

1. explain why accurate record keeping is vital in a medical environment
2. identify the different types of records that a medical administrator may work with
3. describe how the medical administrator can ensure that records are accurate
4. describe the use of information systems in a medical environment.

Assessment criteria explained

For 1. the learner should be able to

- understand that the records the administrator/receptionist is involved with will be used for funding in general practice (the learner does not need to understand the actual funding process), demographics for medical audit, and for financial audit, and that accuracy is vital
- explain the importance of accurate record keeping eg: easy to follow; accurate records will contribute to the success of the practice; saves time and effort; enhances patient care.

For 2. the learner should be able to

- give examples of both paper and computer records/documents such as patient registration forms, hospital medical records, claim forms.

For 3. the learner should be able to

- The learner should be able to give examples of how to maintain accuracy in the medical environment eg always check work thoroughly, repeat messages if unsure, ensure typing is accurate.

For 4. the learner should be able to

- describe the use of information systems within the medical environment eg PAS, HISS, e-mail, computerised filing, databases
- expand the abbreviations relating to computerised administration systems ie PAS and HISS.

Unit 3

Administration Skills in a Medical Environment

Outcome 3

Understand primary and secondary care registrations

Assessment Criteria

The learner can:

1. explain the different eligibility criteria for registration in primary and secondary care
2. explain the main features of a patient's primary care record and secondary care record(s).

Assessment criteria explained

For 1. the learner should be able to

- explain that registration in
 - **primary care** is dependent on geographical proximity. Other criteria to be considered include: the practice capacity to accommodate new patients; does the patient live within the practice area? Is the patient entitled to NHS treatment ie: is the patient from overseas? Is the patient resident in the UK and seeking temporary treatment? For registration in primary care the patient needs to complete personal details on form GMS1
 - **secondary care**, there is no limit to the number of hospitals a patient may attend, however a patient needs to be eligible for treatment under the NHS. (Learners should be made aware of pre-registration/registration procedures where eligibility exists but this will not be assessed.)

For 2. the learner should be able to

- explain that a patient's primary care record is unique as it follows the patient throughout their life from the cradle to the grave (ie from one GP to the next). It shows the patient's names, demographic details, previous illnesses including significant episodes in the lives of their subjects.
- explain that a hospital medical record relates to one episode and remains with the hospital. An individual may have hospital records at more than one hospital.
- describe how the secondary care medical records are constructed eg five sections.

Unit 3

Administration Skills in a Medical Environment

Outcome 4

Understand medical appointment systems

Assessment Criteria

The learner can:

1. describe the main features of appointment systems in general practice and their benefits
2. describe the different appointment routes in secondary care.

Assessment criteria explained

For 1. the learner should be able to

- describe the main features of appointment systems – pre-booking or first come first served
- describe the benefits of pre-booking, for example for routine and repeat visits, and open slots where emergencies can be seen
- identify the 14 day rule for urgent referrals
- describe the advantages of and disadvantages of computerised appointment systems.

For 2. the learner should be able to

- describe the different hospital appointment routes eg referral from GP to consultant who then prioritises patients on a clinical basis; special clinics for particular conditions; centralised appointment systems; via A&E; via NHS Direct or via walk in centres or national alternative
- identify the main stages in administration including the commonly used abbreviations eg TCI, DNA, WL.

Unit 3

Outcome 5

Administration Skills in a Medical Environment

Understand the principles of repeat prescribing

Assessment Criteria

The learner can:

1. explain the procedure for issuing repeat prescriptions.

Assessment criteria explained

For 1. the learner should be able to

- describe the safe procedure for issuing repeat prescriptions eg: checking the patient's details (full name, date of birth, address) against medical records; checking review dates; checking spelling of medication; checking correct dosage with medical records; verify the patient's details when handing out prescriptions
- explain the correct method of storing unused prescription pads and completed prescriptions to prevent misuse of drugs eg: ensure unused prescription pads are locked away when not in use; completed prescriptions are kept out of sight and reach of patients and locked away when the surgery is closed.

Unit 3

Administration Skills in a Medical Environment

Outcome 6

Understand general administrative duties in a medical environment

Assessment Criteria

The learner can:

1. describe how to use fax machines and e-mail in a medical environment
2. describe how to deal with incoming and outgoing post
3. describe basic filing rules
4. describe how the internet and intranet sites are used in a medical environment.

Assessment criteria explained

For 1. the learner should be able to

- describe how the need for confidentiality has an impact on the use of e-mail and fax, the checks that should be made, the use of passwords and the importance of maintaining equipment and supplies.

For 2. the learner should be able to

- list the checks and procedures which should be carried out when receiving and sending post, and for suspicious parcels
- identify different postal services including courier services.

For 3. the learner should be able to

- describe different types of filing systems ie alphabetical, numerical, chronological , geographical, subject, terminal digit
- describe retention rules for patient records
- describe how to dispose of confidential documents when they no longer need to be retained eg confidential waste bags or shredding
- state the basic 'how to' of filing eg establish what methods of filing is going to be followed and make sure all the papers are in place to start with.

For 4. the learner should be able to

- describe the uses of the internet eg meaning of medical terms, purchase books and equipment, can be used to set up network groups etc and its benefits eg it is easily accessible
- describe the uses of the intranet eg a source of information on policies and procedures, and its benefits eg can help to reduce the amount of paper
- describe how security is maintained eg individual password used , screen savers, and backup of data at regular intervals.

Unit 3

Administration Skills in a Medical Environment

Outcome 7

Understand what constitutes a team

Assessment Criteria

The learner can:

1. Explain the key features of a team.

Assessment criteria explained

For 1. the learner should be able to

- produce a definition of a team eg: a team is a group of people with complementary skills working together for a common goal
- identify and explain the key features of an effective team:
 - communication eg regular meetings, encouragement of new ideas and positive feedback
 - support eg shared aims and objectives, accept feedback, working together, share knowledge
 - trust eg being open and honest with co-workers, being able to express opinions within the team, sense of team spirit.

Unit 3

Administration Skills in a Medical Environment

Notes for guidance

Learning outcome 1

Prioritisation of work:

- complete essential tasks first in accordance with instructions, listen carefully to instructions first time round to avoid having to ask again later, set aside time to liaise with the supervisor/manager, avoid unnecessary interruptions, challenge interruptions, write a to do list at the end of each day, plan ahead use planning aids eg diary, wall charts etc, set realistic targets, do not try to tackle too many things at once and end up with nothing completely finished, delegate when necessary
- be tidy, keep a clear desk and cut down on unnecessary paperwork, ensure all essential reference materials are to hand before starting a task, do not waste time on personal activities eg office gossip, personal phone calls etc
- do not try and short-circuit a task eg by failing to consult an instruction manual when using an unfamiliar piece of equipment, schedule uninterrupted 'thinking' time, prioritise – must, should, could, check deadlines, anticipate problems
- work within own natural rhythms, build in some flexibility, write things down, be confident, and decide primary values. If a task seems too difficult, break it down into several smaller tasks, be systematic in approach to tasks
- understand how both manual and electronic diaries are used
 - forecasting** - can put in regular clinics/meetings in advance; can identify when other events can be scheduled; know historically the amount of time needed for certain events/appointments/meetings; estimate workload for forthcoming year to enable additional clinics to be scheduled (or reduction in no of clinics/meetings)
 - record-keeping** – keep a record of appointments etc which can be referred to at a later date; may need to look back to identify where supervisor/manager was on a particular day; historical record (some health professionals must keep diaries for 10 years); can be used to assist expense claims; evidence of work done
 - reminder of forthcoming events** – ensures no double-booking; holidays, study leave etc can be booked in advance and necessary parties given notice.

Learning outcome 2

Use of PAS/HISS within the medical environment eg:

- e-mail – can send messages any time any where and be read by the recipient at their convenience
- databases - computerised recall systems for cervical cytology and children's Immunisation, tracking items of service payments from the Health Authority, GP/HA link service which combines computers and communications – this replaces paper based registration.

Learning outcome 5

Process for the issue of repeat prescriptions:

The request may come by post, be handed into the surgery or left in a special box. The request needs to be checked against the patients' record for both the drugs requested and length of time since review. The prescription, once prepared, will go to the doctor for signing. The person handing out prescriptions should be certain of the identity of the recipient.

Learning outcome 6

- Confidentiality has an impact on the use of e-mail and fax, how sensitive documents should only be sent to a safe haven fax machine, what checks should be made to ensure that e-mail addresses and fax numbers are correct, how passwords are used. In addition, the learner should be aware of the importance of maintaining the equipment, by keeping adequate paper stocked etc.
- Checks which should be carried out when receiving and sending post, eg incoming mail:
 - sort mail into recipients
 - open envelope, follow procedures for mail marked personal/private/confidential etc
 - date stamp, check enclosures are present
 - clip/staple loose papers together
 - enter any monies into remittance book
 - enter into incoming mail book
 - distribute to recipients
 - scan letters into computer
 - follow procedures for suspicious parcel
 - be aware of confidentiality
 - outgoing mail:- ensure letters are ready/collected by required time
 - check letters are signed, check enclosures are attached, fold into appropriate sized envelope
 - ensure correct procedures followed for internal mail or mail for other NHS organisations (blue bag, hospital van etc) weigh envelope
 - stamp or frank with appropriate postage
 - franked mail should be faced ready for collection, enter into outgoing post book
 - correct letter in correct envelope
 - name and address can be seen through window if window envelopes used.
- Retention rules: depends on the purposes for which the patient records are to be used. Obstetric records 25 years or 10 years after the death of the child (but not the mother), children and young people until the 25th or 26th birthday if an entry was made when the patient was 17 or 10 years after a patient's death, mental health records 20 years after no further treatment is considered necessary or 10 years after the patient's death, all other patient records 10 years after the conclusion of treatment, patient's death or patient's permanent departure from the country.
- Internet - a framework which allows the exchange of information between computers. Can be used for the following: research information eg the meaning of medical terms, illnesses, new drugs, international articles, web mail, gauge public opinion on high profile medical matters, purchase medical books, equipment, best practice network groups, could be set up to provide key information regularly, communicate with people, share resources and ideas with other members of the medical profession, accessibility, intuitive and targeted
 - an intranet is a private internet specific to an organisation, designed to bring about fast and easy access to information.
 - it enables employees to share information, collaborate and improve communication
 - employees have access to the following documents:
 - health and safety policies and procedures
 - recruitment and selection policies
 - disciplinary procedures
 - hospital organisation chart
 - hr policies – job vacancies etc
 - newsletters, links with local gp practices
 - emergency protocols
 - reduces paperwork, used for e-mailing other staff.
- Security when using the internet eg individual password used, backup centre to ensure reliability, data encryption for protection and security, access control, firewall set up, managed e-mail, security audit.

Unit 4

Communication Skills in a Medical Environment

Level: 2

Credit value: 7

Unit aim

The aim of this unit is to equip the learner with the knowledge and skills to be able to communicate appropriately with a range of people in a medical environment. It enables the learner to understand the importance of the non-verbal as well as verbal aspects of communication, to understand what factors may make communication difficult and how to adapt communication in these situations. It will also equip the learner with the knowledge of how to use the telephone confidentially, in accordance with the special requirements of a medical environment, as well as develop skills on composing appropriate written documents.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Understand the importance of interpersonal skills when meeting patients, visitors and colleagues
2. Understand telephone techniques in a medical context
3. Understand diversity and its effects on work in a medical environment
4. Be able to use different forms of electronic and written communication within a medical environment

Guided learning hours

It is recommended that **60** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 N/SVQ in Business and Administration.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration.

Assessment and grading

This unit will be assessed by an externally set and internally marked assignment covering all learning outcomes, graded Pass/Merit/Distinction.

Unit 4 **Communication Skills in a Medical Environment**

Outcome 1 Understand the importance of interpersonal skills when meeting patients, visitors and colleagues

Assessment Criteria

The learner can:

1. identify the key features of face-to-face communication
2. explain why non-verbal communication is important
3. describe techniques to assist in face-to-face communication
4. describe why face-to-face communication might be difficult
5. describe how to adapt communication to difficult personal situations.

Assessment criteria explained

For 1. the learner should be able to

- identify the key features of face-to-face communication ie: speaking, listening and non-verbal communication.

For 2. the learner should be able to

- explain why non-verbal communication is so important alongside speaking and listening. Learners will need to give examples of non-verbal communication, including facial expression and the use of eye contact, and positive and negative body language. They should be able to offer examples of gestures and body posture which will reinforce a message eg nodding and those that will create a barrier eg arms folded, looking away from speaker.

For 3. the learner should be able to

- give examples of the different techniques used to obtain information from patients, visitors and colleagues: open and closed questions, positive tone of voice, active listening and avoiding distractions
- give examples of how to promote a professional but friendly image in a medical environment using verbal and non-verbal communication (smile, greeting, level of eye contact, suitable tone, pace, clarity, tone, volume, full concentration, open body posture and active listening, ensuring confidentiality).

For 4. the learner should be able to

- describe how the presence of a third party (an interpreter, signer, chaperone or relative) affects communication – for example when to make eye contact, with whom and whom they should address
- explain why communication with patients and their families may be difficult because of bereavement and illness: showing visible signs of emotion or distress; signs of stress and fatigue; showing anger or aggression; other reactions eg anxiety, fear, disbelief or blame.

For 5. the learner should be able to

- give examples of strategies to help in difficult situations: calm manner, slower, quieter speech, addressing the person by name (confidentiality permitting), empathic listening, checking information carefully; not giving too much information at once; knowing when to summon a colleague's help.

Unit 4 **Communication Skills in a Medical Environment**

Outcome 2 Understand telephone techniques in a medical context

Assessment Criteria

The learner can:

1. describe the features of different telephone techniques
2. explain how to maintain confidentiality while using the telephone.

Assessment criteria explained

For 1. the learner should be able to

- describe how to deal effectively with incoming and outgoing calls in a medical environment: telephone call structure including verbal handshake and etiquette when concluding the call; greeting, checking procedures including telephone alphabet (to be used as a tool to confirm spellings and postcodes and aid communication).effective message taking. Learners will not be tested on the telephone alphabet.
- describe effective telephone technique to include examples of questions to be used to gather information (when, who, what, how and where)
- describe suitable tone of voice level and speech clarity in building patient confidence
- identify the key facts needed when taking a telephone message (date, time, caller's name and details, actions required, message taken by).

For 2. the learner should be able to

- explain why details that would normally be checked by using echo technique or summary/repetition in message taking should be avoided for reasons of confidentiality and what a receptionist/administrator might do instead: confirming through the use of a firm "yes", or "fine" and repeating only dates and times and medical staff details - not patient details
- describe suitable voice level
- explain why care is needed with answerphones in a medical environment and how to use them with confidentiality and efficiency.

Unit 4 **Communication Skills in a Medical Environment**

Outcome 3 Understand diversity and its effects on work in a medical environment

Assessment Criteria

The learner can:

1. explain the concept of unconditional positive regard
2. describe how to communicate with people with special requirements
3. explain how world knowledge and cultural information can help communication and patient care.

Assessment criteria explained

For 1. the learner should be able to

- give a clear definition of unconditional positive regard and that it means giving good service irrespective of personal feelings and prejudices. Learners should be able to give examples eg showing respect to patients, visitors and colleagues irrespective of race, sex, age, sexuality, religion, disability and also factors like personal hygiene, size

For 2. the learner should be able to

- give examples of how to deal sensitively with patients and visitors with: hearing impairment, speech or literacy needs, second language needs
- give examples of alternative ways to communicate eg minicom, Braille, BSL, makaton
- describe how to address the elderly respectfully avoiding terms of endearment and informality

For 3. the learner should be able to

- acknowledge the range of differences that may affect communication eg:
be aware of how different levels of eye contact and attitudes to staff of the opposite sex may cause a barrier
- give examples of different festivals and practices (eg Eid and Ramadan fasting, Diwali, Hannukah) and explain how they may have an impact on booking appointments
- give examples of how cultural differences in dress may affect communication: patient perceptions of staff dress and non-coverage of arms, legs, neck; how to respond positively to patients/visitors /staff wearing dress for religious reasons: scarf, veil, hijab and jilbab, Sikh ceremonial dress
- understand that naming systems may be different and describe how to clarify personal names/family names and use date-of-birth as a possible identifier.

Unit 4 Communication Skills in a Medical Environment

Outcome 4 Be able to use different forms of electronic and written communication within a medical environment

Assessment Criteria

The learner can:

1. select an appropriate form of written and electronic communication for specific situations
2. produce documentation from notes or brief instructions using appropriate format.

Assessment criteria explained

For 1. the learner should be able to

- select appropriate forms from: fax, written message, text message, pager and e-mail
- give reasons for their choice eg confirming appointment details, passing on a routine message, whether to contact a colleague by e-mail, message or pager; confidentiality.

For 2. the learner should be able to

- use different formats ie: fax, e-mail, message, signage, skeleton letter, fact sheet, notice, memo
- produce draft documents using a conventional layout
- produce clear and accurate documents which convey the message
- show the use of courtesy and business-like tone in documents.

Unit 5

Working in the National Health Service (NHS)

Level: 2

Credit value: 8

Unit aim

The aim of this unit is to provide the learner with the knowledge and understanding to enable them to work as a medical receptionist/administrator within a range of medical environments.

It will provide them with a basic knowledge of the structure of National Health Service and an understanding of health and safety, employment legislation and the principles of data protection. They will also develop an understanding of the appraisal process within the healthcare sector and the importance of personal development. They will gain an understanding of patients' rights and of the administrator's role in the complaints process.

Learning outcomes

There are **six** learning outcomes to this unit. The learner will be able to:

1. Know the structure of the National Health Service
2. Understand the differences between primary care, secondary care and community care
3. Understand key workplace legislation regarding employment
4. Understand the importance of personal development
5. Understand how to maintain health and safety in the workplace
6. Understand how to maintain the rights of the patient

Guided learning hours

It is recommended that **60** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 N/SVQ in Business and Administration.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration and Skills for Health.

Assessment and grading

This unit will be assessed by an externally set and externally marked test graded Pass/Merit/Distinction.

Unit 5

Outcome 1

Working in the National Health Service (NHS)

Know the structure of the National Health Service

Assessment Criteria

The learner can:

1. identify the structure of the National Health Service
2. describe the services of other providers of primary care.

Assessment criteria explained

For 1. the learner should be able to

- complete or produce a basic diagram showing the current structure of the NHS (NB Scotland, Northern Ireland and Wales to use own equivalent structure)

For 2. the learner should be able to

- describe other providers of primary care ie: Dentists, Opticians, Pharmacists, NHS Direct, NHS Walk in Centres and provide a brief description of their services.

Unit 5

Working in the National Health Service (NHS)

Outcome 2

Understand the differences between primary care, secondary care and community care

Assessment Criteria

The learner can:

1. explain the difference between primary care and secondary care
2. describe the job roles in primary care
3. explain the services provided by key departments and the roles of staff employed in secondary care
4. describe the range of care available in the community.

Assessment criteria explained

For 1. the learner should be able to

- explain that primary care is the first point of contact for the patient and that secondary care is specialist care in a hospital which the patient will be referred to by their GP or from an A&E episode

For 2. the learner should be able to

- identify the services provided by a GP ie: examine, treat, prescribe, refer, health promotion (eg specialist clinics), private work (eg insurance medicals, passport forms) and describe the GP's role as 'gatekeeper' to NHS services
- identify other members of the multidisciplinary team and describe the job role of each team member and how they work together in the patient's best interest ie:
 - Practice Nurse
 - Community/District Nurse
 - Midwife
 - Practice Manager
 - Secretary
 - Receptionist.

For 3. the learner should be able to

- provide a brief explanation of the services provided by the following departments:
 - Radiology
 - Oncology
 - Orthopaedics
 - Cardiology
 - Accident & Emergency
 - Gastroenterology
- identify key staff, both clinical and administrative, and briefly describe their role:
 - Medical staff ie: Consultant, Registrar, House Officer
 - Nursing staff ie: Sister/Charge nurse, Staff nurse, Health Care Assistant (HCA)
 - Professionals Allied to Medicine (PAMs) ie: Physiotherapist, Occupational Therapist (OT), Radiographer
 - Administrative staff ie: Office Manager, Secretary, Receptionist, Clerk, Team Leader.

For 4. the learner should be able to identify and describe

- the different types of care available in the community eg day centres, care homes, Community Care Workers
- how to access them eg through the local authority social services department/referral from the GP
- the role of the social worker in the provision of community care eg assessments, care plans, advice and coordination of services

- the range of people the Community Social Worker can work with and how they can help them
eg
 - families and children – nursery provision/adoption/fostering/places of safety
 - young people – places of safety/advice/childcare
 - elderly – assessment/care plans/provision of community care workers/meals on wheels/advice
 - asylum seekers – advice/housing/education/benefit advice/childcare
 - young offenders – rehabilitation/benefit advice/housing
 - drug offenders – rehabilitation/advice/housing/childcare.

Unit 5

Outcome 3

Working in the National Health Service (NHS)

Understand key workplace legislation regarding employment

Assessment Criteria

The learner can:

1. identify the terms of a written contract of employment
2. describe how the main discrimination legislation apply to staff
3. describe the grievance procedure.

Assessment criteria explained

For 1. the learner should be able to

- identify the main points included in a written contract of employment and state that the employee is entitled to a written contract of employment within two months of starting work ie: commencement; term; job title and duties; place of work; hours of work; pay; holiday entitlement; pension; sickness absence; termination of contract; notice periods on both sides; disciplinary, dismissal and grievance procedures

For 2. the learner should be able to

- Identify the legislation in place to protect employees from discrimination and describe how it protects staff:
 - The Employment Equality (Age) Regulations 2006 – makes it unlawful to discriminate against a person due to their age. The regulations cover people of all ages, both old and young. The regulations prohibit discrimination in employment and vocational training. This includes access to help and guidance, recruitment, promotion, development, termination, perks and pay
 - Sex Discrimination Act 1975 - makes discrimination unlawful on the grounds of sex, marital status, and gender reassignment. It applies to both men and women and protects staff against harassment, terms of employment and unequal pay.
 - Race Discrimination Act 1976 – makes discrimination unlawful on the grounds of race and religion, a person cannot be treated in an adverse manner due to their ethnicity or beliefs
 - Disability Discrimination Act 2005 – makes it unlawful for an employer to discriminate for any reason which relates to a disability. It is unlawful if he or she fails to provide such reasonable adjustments to the working environment as are required by the Disability Discrimination Act, and he or she cannot justify this failure. Examples of what a reasonable adjustment might be include physical alterations to the workplace as well as changes in work practices.

For 3. the learner should be able to

- describe a basic grievance procedure ie: complaint to manager, discussion, investigation, written complaint, role of HR, conciliation
- identify possible grounds for a grievance eg: discrimination (age/gender/race/disability), bullying, harassment.

Unit 5

Working in the National Health Service (NHS)

Outcome 4

Understand the importance of personal development

Assessment Criteria

The learner can:

1. explain the purpose of continuous professional development (CPD) in relation to NHS policy
2. explain the appraisal/PDR (Personal Development Review) process
3. describe different sources of learning and development opportunities.

Assessment criteria explained

For 1. the learner should be able to

- explain how continuous professional development (CPD) aims to maintain and enhance the skills of the NHS employee eg:
 - it is a requirement of Agenda for Change
 - to enable the employee to pass through the pay gateways
 - improves staff morale and retention
 - enables the employee to comply with the KSF (Knowledge and Skills Framework)
 - provides evidence of the development of the employee for the PDR process.

For 2. the learner should be able to

- explain the appraisal/PDR process and its purpose
 - it is a yearly review process
 - a joint review between the employee and their line manager
 - constructive feedback will be delivered
 - training needs will be identified
 - both the manager and employee will need to prepare for this review.

For 3. the learner should be able to

- describe how learning and development needs are identified eg Training needs analysis with a supervisor, PDR/appraisal process
- describe how needs can be met eg internal training courses, secondments, mentoring and coaching, external courses
- identify the different sources of learning and development opportunities, internal and external eg Trust intranet, internet.

Unit 5

Outcome 5

Working in the National Health Service (NHS)

Understand how to maintain health and safety in the workplace

Assessment Criteria

The learner can:

1. identify health and safety legislation
2. describe how to maintain a safe working environment
3. identify the legislation involved in accident reporting
4. explain the procedure for reporting accidents.

Assessment criteria explained

For 1. the learner should be able to

- identify the Health and Safety at Work Act (HASAWA) and Health & Safety (Display screen equipment) Regulations 1992.

For 2. the learner should be able to

- describe the employee's and employer's main responsibilities under the Acts
- identify risks and hazards in the workplace eg slips, trips and falls, trailing wires, faulty equipment, obstructed walkways, obstructed entrances and exits
- identify the correct posture and seating when using a VDU.

For 3. the learner should be able to

- identify the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR).

For 4. the learner should be able to

- explain the procedure, what must be recorded online and/or manually:
 - date and time
 - name and occupation of injured person
 - nature of injury
 - place where accident/occurrence happened
 - description of circumstances.

Unit 5

Working in the National Health Service (NHS)

Outcome 6

Understand how to maintain the rights of the patient

Assessment Criteria

The learner can:

1. identify patients' rights
2. explain the different types of consent
3. describe the legislation governing patient confidentiality
4. explain how to maintain patient confidentiality and the consequences of breaches
5. describe the main stages of a complaint and the role of the medical administrator/receptionist.

Assessment criteria explained

For 1. the learner should be able to

- identify the rights of the patient ie:
 - Access to health services
 - Quality of care and environment
 - Respect, consent and confidentiality
 - Informed choice
 - Involvement in your healthcare and in the NHS
 - Complaint and redress

For 2. the learner should be able to

- identify and explain the following methods of consent:
 - Express consent - written consent for all major diagnostic procedures
 - Implied consent - by presenting oneself at a surgery or outpatient department implies that one is agreeable to examination
 - Informed consent – patient must have a clear understanding of the facts and the implications of going ahead with (or not) the treatment/procedure.

For 3. the learner should be able to

- identify the eight principles of the Data Protection Act 1998
- describe who the Freedom of Information Act 2000 applies to
- identify the 6 Caldicott Guidelines.

For 4. the learner should be able to

- describe methods of maintaining and protecting patient confidentiality in relation to patient data, patient records and patient information and explain the possible consequences to
 - a) The patient
 - b) The NHS
 - c) The NHS employee.

For 5. the learner should be able to

- describe the main stages of a healthcare complaint (process as laid down by the Care Quality Commission):
 - local resolution – complaint made at source/acknowledgment in 3 working days/ investigation/reply within 25 days/resolution
 - Health Service Ombudsman – Independent of NHS/investigates/produces report/decision is final
- describe that the medical administrator/receptionist is the first point of contact, may need to take details of complaint, notify the complaints manager or appropriate person, behave in a calm professional manner with positive regard for the patient.

Unit 5

Working in the National Health Service (NHS)

Notes for guidance

Learning outcome 1

- The learner will only be assessed on the basic structure of the NHS, they will not be assessed on the role of the various departments.
- Learners will need to provide a brief description of the services outlined eg NHS Walk in Centres provide a service that patients can access without an appointment, they offer treatment for minor illnesses and injuries, patients will be assessed by an experienced health professional.

Learning outcome 2

- The learner will only be assessed on the departments stated in the range but teaching can cover a wider range of hospital departments to give the learner a broader knowledge of secondary care departments.
- Learners should be aware of the care available in the community as outlined in the range, that this is available for patients who may be physically and/or mentally disabled, elderly or who have been discharged from hospital etc. This care can be short term or long term and can be accessed through their GP, social worker and health care provider. The learner should understand the role of the community social worker in accessing services and assessing the patient's needs. The social worker will work with a wide variety of people and will visit the patient, assess their needs, produce a care plan and coordinate the services available.

Learning outcome 3

The learner will only be assessed on identifying the discrimination legislation and who it applies to; they will not be assessed on the content of the legislation.

Learning outcome 4

- CPD - it is a requirement of the Agenda for Change pay system that all NHS staff continuously improve their skills in order to progress through defined pay gateways. This ensures a quality service for patients and provides the opportunity for staff development.
- All NHS staff are entitled to a yearly appraisal process called PDR, (personal development review). This allows for two-way feedback on the job role and identifies any gaps in the employee's knowledge and skills. All NHS staff are expected to develop and progress through their time in the NHS and the PDR is an opportunity for staff to identify personal learning needs. This process is documented and used at the next review to assess development and agree future objectives. Both reviewer and staff member need to prepare for the PDR. The staff member will prepare by gathering evidence of learning and development from their CPD file and making a list of possible questions or topics which could be discussed at the review.

Learning outcome 5

- It should be noted that accidents in the workplace are now mainly reported online but a local accident book may be kept for audit purposes. The learner should be aware of the specific details which are required when reporting an accident as outlined in the range.

Learning outcome 6

- The learner will not be assessed on the content and detail contained in the NHS constitution.
- Consent is an ongoing process during any healthcare episode to protect the rights of the patient.

- The Freedom of Information Act applies to all public sector bodies and there is a time limit for providing the information required. Requests received under the Freedom of Information should be passed to the appropriate person in a timely and effective manner as time limits apply to this legislation.
- Practical methods of protecting patient information eg passwords, access levels, attending confidentiality training, not leaving patient files in public areas etc. The learner will be assessed on explaining the consequences of breaches eg
 - a) the patient – embarrassment/loss of confidence in the NHS/sensitive information given to unauthorised person could lead to loss of job or relationship
 - b) the NHS – Legal action/charge of negligence/loss of confidence in the health service/financial penalties
 - c) The employee – loss of job/reputation/legal action/accusation of negligence.

Unit 6

Work Experience in a Medical Environment

Level: 2

Credit value: 5

Unit aim

The aim of this unit is to provide the learner with the knowledge and understanding to enable them to work as a medical receptionist/administrator within a range of medical environments.

It will provide them with a basic knowledge of the structure of National Health Service and an understanding of health and safety, employment legislation and the principles of data protection. They will also develop an understanding of the appraisal process within the healthcare sector and the importance of personal development. They will gain an understanding of patients' rights and of the administrator's role in the complaints process.

Learning outcomes

There are **five** learning outcomes to this unit. The learner will be able to:

1. Be able to communicate with other people in a medical environment
2. Understand the medical organisation/setting in which they work
3. Be able to work with other people
4. Be able to follow agreed guidelines, procedures and codes of practice in a medical environment
5. Be able to improve own performance in a medical environment

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis. In addition 30 hours in a work placement is required, see Notes for guidance.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 N/SVQ in Business and Administration.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration.

Assessment and grading

This unit will be assessed by a mini portfolio of evidence based on the work placement, graded Pass only. See separate Assessment guide 4419-01/02.

Unit 6

Work Experience in a Medical Environment

Outcome 1

Be able to communicate with other people in a medical environment

Assessment Criteria

The learner can:

1. listen actively to information that other people are communicating
2. ask questions to clarify and check information
3. provide accurate, clear and structured information to other people
4. provide information in a way that meets the needs of other people
5. read written material to identify information needed
6. use appropriate tone, language and body language when dealing with patients, visitors and colleagues
7. respond appropriately to incoming telephone calls.

Assessment criteria explained

For 1.1-1.7 other people comprises:

- Manager/supervisor
- Work colleague
- Medical staff – doctor, nurse or diagnostic staff
- Patients and their carers

For 1-3 the learner should be able to

- show active listening skills, interact in one-to-one situations and provide information appropriately eg not giving too much information at once.

For 3. the learner should be able to

- show that they can answer routine questions. These might include: opening times, information about services to patients or appointments, when a colleague might be available. If the learner cannot answer a question, they need to refer to the correct place or person to find the information.

For 4. the learner should be able to

- use suitable language eg technical/non-technical or meet diversity needs eg for patients hard of hearing or with second language needs.

For 5. the learner should be able to

- locate and check information sources to supply details as in the examples in 3
- give examples of the information sources they have used when answering queries – for example diary, practice leaflet, intranet, induction manuals, guidelines, incoming mail.

For 6. the learner should be able to

- answer the telephone promptly, appropriately and efficiently eg taking notes, and maintain confidentiality
- transfer calls, following the correct procedure/introducing the caller. It may be that the call subsequently had to be referred to a colleague to provide further information as the learner may well be new to the organisation. In this situation, they have acted correctly and should be credited with answering the call.

Unit 6

Work Experience in a Medical Environment

Outcome 2

Understand the medical organisation/setting in which they work

Assessment Criteria

The learner can:

1. describe the organisation's function and purpose
2. explain how the organisation links with other organisations and healthcare facilities
3. describe own team and its role within the organisation
4. describe how own role contributes to the organisation.

Assessment criteria explained

For 1. the learner should be able to

- describe their organisation, the area and population where it is located, its size, departments (where applicable) staffing and what service it offers to patients.

For 2. the learner should be able to

- explain how their team fits into local provision eg primary and secondary care nearby or to other teams eg hospital departments. There may be strong links to the community team eg midwives or health visitors.

For 3. the learner should be able to

- describe the team in which they work, its purpose and its structure.

For 4. the learner should be able to

- describe how their job role links to others in the team
- describe the range tasks they cover in their role and state why they are important.

Unit 6

Outcome 3

Work Experience in a Medical Environment

Be able to work with other people

Assessment Criteria

The learner can:

1. treat work colleagues with honesty, respect and consideration
2. work in a way that supports their medical team and its objectives
3. agree objectives with the people they work with
4. keep other people informed about own progress
5. help and support other people in their work.

Assessment criteria explained

For 1. the learner should be able to

- respond positively to colleagues.

For 2-4. the learner should be able to

- listen to and check information carefully
- use face-to-face communication, e-mail or telephone to keep colleagues informed in line with how the team routinely works.

For 5. the learner should be able to

- give an example of when they helped/supported a colleague.

Unit 6

Work Experience in a Medical Environment

Outcome 4

Be able to follow agreed guidelines, procedures and codes of practice in a medical environment

Assessment Criteria

The learner can:

1. follow organisational requirements in relation to security of information and patient confidentiality
2. follow the policies, systems and procedures that are relevant to own role
3. store and retrieve information securely using the organisation's systems
4. use technology, equipment and resources safely
5. follow basic health and safety legislation.

Assessment criteria explained

For 1. the learner should be able to

- follow organisational requirements as specified by the supervisor, practice manager etc at induction or the start of the placement; these may include :
 - maintaining confidentiality
 - data protection
 - freedom of information
- know when to seek a colleague's help.

For 2-4. the learner should be able to

- follow guidelines and procedures as specified by the workplace and may include:
 - filing rules followed
 - use of passwords and closing down screens
 - instruction manual or safety guidelines regarding equipment or resources
 - agreed procedures on confidential waste.
 - use the computer and other equipment to include any two from:
 - Photocopier, scanner, fax, computer printer
 - use resources eg: stationery, office consumables.

For 5. the learner should be able to

- show they have followed basic Health and Safety legislation in relation to their own and colleagues' safety ie individual's main responsibilities under Health and Safety at Work Act 1974, COSHH; display screen equipment regulations.

Unit 6

Work Experience in a Medical Environment

Outcome 5

Be able to improve own performance in a medical environment

Assessment Criteria

The learner can:

1. agree working methods and standards to be achieved
2. agree realistic targets and an achievable timescale for work tasks
3. show a willingness to take on new challenges
4. take responsibility for own work
5. prioritise tasks and manage own time
6. complete work to agreed standards and timescale.

Assessment criteria explained

For 1-2. the learner should be able to

- listen to instructions and ask questions to clarify tasks.

For 3-4. the learner should be able to

- carry out a range of tasks presenting different challenges eg routine administration, answering the telephone, passing on messages, receiving patients and visitors, word processing
- give an example of an activity or situation which presented a new challenge or special difficulty and describe how they responded.

For 5-6. the learner should be able to

- provide evidence of completing any two work products from:
 - e-mail, memo or telephone message
 - template used/skeleton letter
 - form or list completed
 - word processed document eg short report or medical information (Items may need to be edited to maintain confidentiality).

Unit 6 Work Experience in a Medical Environment

Notes for guidance

Work experience is a valuable learning opportunity and candidates should look at their work placement providers as potential employers and therefore demonstrate an appropriate and professional attitude at all times. Work experience is also invaluable for candidates already in post in a health care environment as a means of broadening experience.

Whilst on placement candidates must be made aware of the security regulations eg confidentiality, company policy, data protection, that all employers expect their staff to comply with. In each working environment candidates should receive guidelines with regard to expectations relating to punctuality, reliability, accuracy, dress code and general performance.

Hours

Candidates should be allocated a work placement of 5 days or 30 hours, this can be on a part or full-time basis. It is not necessary to do the work experience in a single block, it may be undertaken in small blocks of time.

Setting/organisation

Work placements should be undertaken in a health care setting, where candidates have experience of patient contact, handling medical records, utilising communication skills and observing appointment procedures within hospital and primary care. Where primary care or secondary care placement proves difficult, other health care settings will be acceptable.

Areas for consideration:

- Ambulance Control Centres
- Community Health
- Community Health Councils
- Day centres for those with learning or physical disabilities or elderly persons
- Dental Practices
- General Medical Practices
- Elderly Care Units
- Family Planning Clinics
- Health Authorities
- Health Education Departments
- Hospitals
- Hospices
- Nursing Homes
- Opticians
- Pharmacies
- Prison Hospitals
- Private Hospitals
- Social Services Departments
- Specialised Clinics
- Well-Women Clinics
- Well-Men Clinics

Guidelines for the placement organiser and provider

It is recognised that work experience providers have a valuable role in supporting candidates towards their diploma. The time spent on placement puts their college work into perspective and helps develop professionalism. All candidates understand the need for confidentiality and will have been fully briefed by the tutors before embarking on a placement. They also understand the need to respect health and safety in the workplace.

The following areas of work and skills are key to the candidate's success in achieving their Diploma:

- Reception duties
- Greeting visitors and patients face to face; verbal and non-verbal communication
- Telephone skills
- Booking appointments, transmission of accurate messages, development of a confident professional telephone manner
- Filing systems
- Filing and retrieval of patients' notes/ correspondence/medical records; use of computerised and paper-based filing systems
- Appointment systems
- Use of diaries and planners either paper-based or computerised
- Working relationships
- Working as part of a team; contact with a range of key professionals; understanding when to refer a problem to a supervisor
- Additional areas

These will support the candidate's learning and enhance their experience:

- IT Skills
- Data input and word-processing as required
- Systems and resources
- Dealing with post and stock
- Observation of clinics
- Observation/assistance with reception

Guidelines for candidates

Detailed guidelines for candidates are published in the 4419-01/02 Assessment guide available from the City & Guilds website. Tutors should provide a copy of the guidelines to each candidate.

Assessment

The work experience unit is assessed through a mini portfolio of evidence based on the candidate's work placement, full details are contained in the 4419-01/02 Assessment guide.

Candidates already working within a medical environment can choose to base their evidence on either their main work role or on their work placement.

Unit 7

Spreadsheet Software (1)

Level: 1

Credit value: 3

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Use a spreadsheet to enter, edit and organise numerical and other data
2. Use appropriate formulas and tools to summarise and display spreadsheet information
3. Select and use appropriate tools and techniques to present spreadsheet information effectively

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 1 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Learning outcomes and assessment criteria

Outcome 1 Use a spreadsheet to enter, edit and organise numerical and other data

The learner can:

1. identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs
2. enter and edit numerical and other data accurately
3. store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.

Outcome 2 Use appropriate formulas and tools to summarise and display spreadsheet information

The learner can:

1. store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
2. use functions and formulas to meet calculation requirements
3. use spreadsheet tools and techniques to summarise and display information.

Outcome 3 Select and use appropriate tools and techniques to present spreadsheet information effectively

The learner can:

1. select and use appropriate tools and techniques to format spreadsheet cells, rows and columns
2. identify which chart or graph type to use to display information
3. select and use appropriate tools and techniques to generate, develop and format charts and graphs
4. select and use appropriate page layout to present and print spreadsheet information
5. check information meets needs, using spreadsheet tools and making corrections as necessary.

Unit 8 Database Software (1)

Level: 1

Credit value: 3

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **number** learning outcomes to this unit. The learner will be able to:

1. Enter, edit and organise structured information in a database
2. Use database software tools to extract information and produce reports

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 1 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Unit 8

Database Software (1)

Learning outcomes and assessment criteria

Outcome 1 Enter, edit and organise structured information in a database

The learner can:

1. identify the main components of a database
2. create a database table for a purpose using specified fields
3. enter structured data into records to meet requirements
4. locate and amend data records
5. respond appropriately to data entry error messages
6. check data meets needs, using its tools and making corrections as necessary

Outcome 2 Use database software tools to extract information and produce reports

The learner can:

1. identify queries which meet information requirements
2. run simple database queries
3. identify reports which meet information requirements
4. generate and print pre-defined database reports.

Level: 1

Credit value: 3

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Input and combine text and other information within presentation slides
2. Use presentation software tools to structure, edit and format slides
3. Prepare slides for presentation to meet needs

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 1 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Learning outcomes and assessment criteria

Outcome 1 Input and combine text and other information within presentation slides

The learner can:

1. identify what types of information are required for the presentation
2. select and use different slide layouts as appropriate for different types of information
3. enter information into presentation slides so that it is ready for editing and formatting
4. identify any constraints which may affect the presentation
5. combine information of different forms or from different sources for presentations
6. store and retrieve presentation files effectively, in line with local guidelines and conventions where available.

Outcome 2 Use presentation software tools to structure, edit and format slides

The learner can:

1. identify what slide structure to use
2. select and use an appropriate template to structure slides
3. select and use appropriate techniques to edit slides
4. select and use appropriate techniques to format slides.

Outcome 3 Prepare slides for presentation to meet needs

The learner can:

1. identify how to present slides to meet needs and communicate effectively
2. prepare slides for presentation
3. check presentation meets needs, using it tools and making corrections as necessary.

Unit 10

Word Processing Software (2)

Level: 2

Credit value: 4

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Enter and combine text and other information accurately within word processing documents
2. Create and modify layout and structures for word processing documents
3. Use word processing software tools to format and present documents effectively to meet requirements

Guided learning hours

It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 2 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Learning outcomes and assessment criteria

Outcome 1 Enter and combine text and other information accurately within word processing documents

The learner can:

1. identify what types of information are needed in documents
2. use appropriate techniques to enter text and other information accurately and efficiently
3. select and use appropriate templates for different purposes
4. identify when and how to combine and merge information from other software or other documents
5. select and use a range of editing tools to amend document content
6. combine or merge information within a document from a range of sources
7. store and retrieve document and template files effectively, in line with local guidelines and conventions where available.

Outcome 2 Create and modify layout and structures for word processing documents

The learner can:

1. identify the document requirements for structure and style
2. identify what templates and styles are available and when to use them
3. create and modify columns, tables and forms to organise information
4. select and apply styles to text.

Outcome 3 Use word processing software tools to format and present documents effectively to meet requirements

The learner can:

1. identify how the document should be formatted to aid meaning
2. select and use appropriate techniques to format characters and paragraphs
3. select and use appropriate page and section layouts to present and print documents
4. describe any quality problems with documents
5. check documents meet needs, using it tools and making corrections as necessary
6. respond appropriately to quality problems with documents so that outcomes meet needs.

Level: 2

Credit value: 4

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Use a spreadsheet to enter, edit and organise numerical and other data
2. Select and use appropriate formulas and data analysis tools to meet requirements
3. Select and use tools and techniques to present and format spreadsheet information

Guided learning hours

It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 1 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Learning outcomes and assessment criteria

Outcome 0 Use a spreadsheet to enter, edit and organise numerical and other data

The learner can:

1. identify what numerical and other information is needed in the spreadsheet and how it should be structured
2. enter and edit numerical and other data accurately
3. combine and link data across worksheets
4. store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.

Outcome 2 Select and use appropriate formulas and data analysis tools to meet requirements

The learner can:

1. identify which tools and techniques to use to analyse and manipulate data to meet requirements
2. select and use a range of appropriate functions and formulas to meet calculation requirements
3. use a range of tools and techniques to analyse and manipulate data to meet requirements.

Outcome 3 Select and use tools and techniques to present and format spreadsheet information

The learner can:

1. plan how to present and format spreadsheet information effectively to meet needs
2. select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
3. select and format an appropriate chart or graph type to display selected information
4. select and use appropriate page layout to present and print spreadsheet information
5. check information meets needs, using spreadsheet tools and making corrections as necessary
6. describe how to find errors in spreadsheet formulas
7. respond appropriately to any problems with spreadsheets.

Level: 2

Credit value: 4

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Create and modify non-relational database tables
2. Enter, edit and organise structured information in a database
3. Use database software tools to run queries and produce reports

Guided learning hours

It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 2 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Learning outcomes and assessment criteria

Outcome 1 Create and modify non-relational database tables

The learner can:

1. identify the components of a database design
2. describe the field characteristics for the data required
3. create and modify database tables using a range of field types
4. describe ways to maintain data integrity
5. respond appropriately to problems with database tables
6. use database tools and techniques to ensure data integrity is maintained.

Outcome 2 Enter, edit and organise structured information in a database

The learner can:

1. create forms to enter, edit and organise data in a database
2. select and use appropriate tools and techniques to format data entry forms
3. check data entry meets needs, using it tools and making corrections as necessary
4. respond appropriately to data entry errors.

Outcome 3 Use database software tools to run queries and produce reports

The learner can:

1. create and run database queries using multiple criteria to display or amend selected data
2. plan and produce database reports from a single table non-relational database
3. select and use appropriate tools and techniques to format database reports
4. check reports meet needs, using it tools and making corrections as necessary.

Level: 2

Credit value: 4

Unit aims

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Input and combine text and other information within presentation slides
2. Use presentation software tools to structure, edit and format slide sequences
3. Prepare slideshow for presentation

Guided learning hours

It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is based on the Level 2 National Occupational Standards for IT users.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by e-Skills UK, the Sector Skills Council for IT and Telecoms.

Assessment

This unit will be assessed by an externally set and internally marked assignment covering practical skills graded Pass/Merit/Distinction.

Learning outcomes and assessment criteria

Outcome 1 Input and combine text and other information within presentation slides

The learner can:

1. identify what types of information are required for the presentation
2. enter text and other information using layouts appropriate to type of information
3. insert charts and tables into presentation slides
4. insert images, video or sound to enhance the presentation
5. identify any constraints which may affect the presentation
6. organise and combine information of different forms or from different sources for presentations
7. store and retrieve presentation files effectively, in line with local guidelines and conventions where available.

Outcome 2 Use presentation software tools to structure, edit and format slide sequences

The learner can:

1. identify what slide structure and themes to use
2. select, change and use appropriate templates for slides
3. select and use appropriate techniques to edit slides and presentations to meet needs
4. select and use appropriate techniques to format slides and presentations
5. identify what presentation effects to use to enhance the presentation
6. select and use animation and transition effects appropriately to enhance slide sequences.

Outcome 3 Prepare slideshow for presentation

The learner can:

1. describe how to present slides to meet needs and communicate effectively
2. prepare slideshow for presentation
3. check presentation meets needs, using its tools and making corrections as necessary
4. identify and respond to any quality problems with presentations to ensure that presentations meet needs.

Appendix 1 Drug Classifications

Medical Principles for the Administrator

Drug classification	Usage
ANAESTHETIC	Drug for removal of feeling
ANALGESIC	Drug for relief of pain
ANTIBIOTIC	Drug which kills bacteria
ANTACID	A substance which neutralises stomach acid
ANTICOAGULANT	Drug which reduces blood clotting
ANTIDEPRESSANT	Drug which lifts the patient's mood
ANTI-EMETIC	Drug which reduces nausea
ANTIHISTAMINE	Drug which reduces the production of histamine. Used to treat allergies
ANTIHYPERTENSIVE	Drug which reduces blood pressure
ANTI-INFLAMMATORY	Drug which reduces inflammation
ANTIPYRETIC	Drug which reduces fever
ANTITUSSIC	Drug which reduces coughing
BRONCHODILATOR	Drug which dilates the bronchial tubes Used in the treatment of asthma
CHEMOTHERAPY	Toxic drugs which kill malignant cells
CONTRACEPTIVE	Drug which prevents conception
DECONGESTANT	Drug which relieves congestion of mucus membranes
DIURETIC	Drug which increases the production of urine
EXPECTORANT	Liquid form of drugs which encourages coughing up of secretions from the respiratory tract
NARCOTIC	Drug derived from opium which will induce deep sleep
PROPHYLACTIC	A substance used to prevent disease
STATINS	Drug used to lower cholesterol levels in the blood
TRANQUILLISER	Drug which reduces anxiety

Appendix 2 List of Bones

Medical Principles for the Administrator

Bone	Position
Cranium	Skull – contains brain
Scapula	Shoulder blade
Clavicle	Collar bone
Humerus	Top of arm
Radius	Lower arm
Ulna	
Carpals	Wrist
Metacarpals	Hand
Phalanges	Fingers and toes
Vertebrae	Spinal column
Coccyx	Bottom of spine
Ribs	Chest
Sternum	Breast bone
Pelvic girdle	Surrounds lower abdomen, contains the hip bones
Femur	Upper leg
Patella	Knee cap
Fibula	Thinner lower leg bone
Tibia	Shin Bone
Tarsals	Ankle bones
Metatarsals	Feet

Appendix 3 Organs and Systems

Medical Principles for the Administrator

Organ	Common Name /Position/Function	Body System
Brain	Controls body functions	Centre of the nervous system
Skin	Outer protective cover of the body	Skin
Spleen	Lies on underside of stomach. Produces antibodies / acts as a defence mechanism and controls the volume of blood circulating	Lymphatic system
Liver	Factory of the body. Breaks down toxins, nitrogenous waste and drugs for removal from the body. Produces bile	Digestive system
Oesophagus	Gullet/food pipe. Transports food from throat to stomach	Digestive system
Stomach	Receives food, commences protein digestion	Digestive system
(Duodenum, Jejunum and Ileum)	Small intestine Long tube from stomach to colon where digestion is completed and most absorption takes place	Digestive system
Colon	Large intestine/Absorbs water and manufactures faeces	Digestive system
Pancreas	Gland below the stomach in the curve of the duodenum which produces insulin and pancreatic juice	Digestive system /Endocrine system
Gall bladder	Lies on underside of liver. Concentrates and stores bile for excretion into duodenum to aid digestion	Digestive system
Pharynx	Throat, back of the nose and mouth	Respiratory system
Larynx	Voice box (forms Adam's Apple in the male)	Respiratory system
Trachea	Wind pipe takes air to and from the lungs	Respiratory system
Bronchus	Large airway passages transporting air into the lungs	Respiratory system
Lungs	2 organs organ lying in the chest where the exchange of gases takes place during breathing	Respiratory system
Heart	Muscular pump lying between the lungs which pumps to circulate blood around the body.	Cardio-vascular system
Aorta	Main artery of the body. Carries oxygenated blood from the heart to the body	Cardio-vascular system
Superior Vena cava / Inferior Vena Cava	Main veins. Carry de-oxygenated blood from the body back to the heart	Cardio-vascular
Arteries	Blood vessels which usually carry	Cardio-vascular system

Organ	Common Name /Position/Function	Body System
	oxygenated blood away from the heart and around the body	
Veins	Blood vessels which usually carry de-oxygenated blood back to the heart	Cardio-vascular system
Kidneys	The 2 organs in the body that produce urine	Urinary system
Ureters	The tubes fro that connect the kidneys to bladder	Urinary system
Bladder	The organ that holds urine prior to its excretion from the body	Urinary system
Urethra	Tube which carries urine from the bladder to the outside of the body	Urinary system
Ovaries	Female organs that produce eggs and hormones	Female reproductive system
Fallopian/ uterine tubes	2 tubes, connected to the womb, where fertilization of the egg takes place	Female reproductive system
Uterus	Womb. Organ where the fetus grows	Female reproductive system
Vagina	Birth canal. Organ which connects the womb to the outside of the body	Female reproductive system
Mammary glands	Breasts. 2 organs situated at the front of the chest which produce milk to feed the newborn baby	Female reproductive system

Appendix 4 Sources of information about level accreditation, qualification and credit frameworks and level descriptors

Please visit the following websites to find current information on accreditation, qualification level descriptors and national qualification and credit frameworks and in each country.

Nation	Framework	Who to contact	Websites
England	Qualification and Credit Framework (QCF)	The Qualifications and Curriculum Development Agency	www.qcda.gov.uk
Scotland	Scottish Credit and Qualifications Framework (SQCF)	The Scottish Qualifications Authority	www.scqf.org.uk www.sqa.org.uk
Wales	The Credit and Qualifications Framework for Wales (CQFW)	The Department for Education, Culture and Welsh Language (DECWL)	www.wales.gov.uk
Northern Ireland	Qualification and Credit Framework (QCF)	The Council for Curriculum, Examinations and Assessment	www.ccea.org.uk

Appendix 5 Obtaining centre and qualification approval

Only approved organisations can offer City & Guilds qualifications. Organisations approved by City & Guilds are referred to as **centres**.

Centres must meet a set of quality criteria including:

- provision of adequate physical and human resources
- clear management information systems
- effective assessment and quality assurance procedures including candidate support and reliable recording systems.

An organisation that has not previously offered City & Guilds qualifications must apply for approval to become a centre. This is known as the **centre approval process (CAP)**. Centres also need approval to offer a specific qualification. This is known as the **qualification approval process (QAP)**, (previously known as scheme approval). In order to offer this qualification, organisations which are not already City & Guilds centres must apply for centre and qualification approval at the same time. Existing City & Guilds centres will only need to apply for qualification approval for the particular qualification.

Full details of the procedures and forms for applying for centre and qualification approval are given in *Providing City & Guilds qualifications - a guide to centre and qualification approval*, which is also available on the City & Guilds centre toolkit, or downloadable from the City & Guilds website.

Regional / national offices will support new centres and appoint a Quality Systems Consultant to guide the centre through the approval process. They will also provide details of the fees applicable for approvals.

Assessments must not be undertaken until qualification approval has been obtained.

City & Guilds reserves the right to withdraw qualification or centre approval for reasons of debt, malpractice or non-compliance with City & Guilds' policies, regulations, requirements, procedures and guidelines, or for any reason that may be detrimental to the maintenance of authentic, reliable and valid qualifications or that may prejudice the name of City & Guilds. Further details of the reasons for suspension and withdrawal of approval, procedures and timescales, are contained in *Providing City & Guilds qualifications*.

Appendix 6 Summary of City & Guilds assessment policies

Health and safety

The requirement to follow safe working practices is an integral part of all City & Guilds qualifications and assessments, and it is the responsibility of centres to ensure that all relevant health and safety requirements are in place before candidates start practical assessments.

Should a candidate fail to follow health and safety practice and procedures during an assessment, the assessment must be stopped. The candidate should be informed that they have not reached the standard required to successfully pass the assessment and told the reason why. Candidates may retake the assessment at a later date, at the discretion of the centre. In case of any doubt, guidance should be sought from the external verifier.

Equal opportunities

It is a requirement of centre approval that centres have an equal opportunities policy (see *Providing City & Guilds qualifications*).

The regulatory authorities require City & Guilds to monitor centres to ensure that equal opportunity policies are being followed.

The City & Guilds equal opportunities policy is set out on the City & Guilds website, in *Providing City & Guilds qualifications*, in the *Online Catalogue*, and is also available from the City & Guilds Customer Relations department.

Access to assessment

Qualifications on the Qualifications and Credit Framework are open to all, irrespective of gender, race, creed, age or special needs. The centre co-ordinator should ensure that no candidate is subject to unfair discrimination on any ground in relation to access to assessment and the fairness of the assessment.

City & Guilds' *Access to assessment and qualifications guidance and regulations* document is available on the City & Guilds website. It provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

Access arrangements are pre-assessment adjustments primarily based on history of need and provision, for instance the provision of a reader for a visually impaired candidate.

Special consideration refers to post-examination adjustments to reflect temporary illness, injury or indisposition at the time of the assessment.

Appeals

Centres must have their own, auditable, appeals procedure that must be explained to candidates during their induction. Appeals must be fully documented by the quality assurance co-ordinator and made available to the external verifier and/or City & Guilds.

Further information on appeals is given in *Providing City & Guilds qualifications*. There is also information on appeals for centres and learners on the City & Guilds website or available from the Customer Relations department.

Appendix 7 Funding

City & Guilds does not provide details on funding as this may vary between regions.

Centres should contact the appropriate funding body to check eligibility for funding and any regional/national arrangements which may apply to the centre or candidates.

For funding regulatory purposes, candidates should not be entered for a qualification of the same type, level and content as that of a qualification they already hold.

Please see the table below for where to find out more about the funding arrangements.

Nation	Who to contact	For higher level qualifications
England	<p>The Learning and Skills Council (LSC) is responsible for funding and planning education and training for over 16-year-olds. Each year the LSC publishes guidance on funding methodology and rates. There is separate guidance for further education and work-based learning.</p> <p>Further information on funding is available on the Learning and Skills Council website at www.lsc.gov.uk and, for funding for a specific qualification, on the Learning Aims Database http://providers.lsc.gov.uk/lad.</p>	<p>Contact the Higher Education Funding Council for England at www.hefce.ac.uk.</p>
Scotland	<p>Colleges should contact the Scottish Further Education Funding Council, at www.sfc.co.uk. Training providers should contact Scottish Enterprise at www.scottish-enterprise.com or one of the Local Enterprise Companies.</p>	<p>Contact the Scottish Higher Education Funding Council at www.shefc.ac.uk.</p>
Wales	<p>Centres should contact the The Department for Education, Culture and Welsh Language (DECWL): www.wales.gov.uk</p>	<p>Contact the The Department for Education, Culture and Welsh Language (DECWL): www.new.wales.gov.uk</p>
Northern Ireland	<p>Please contact the Department for Employment and Learning at www.delni.gov.uk.</p>	<p>Contact the Department for Employment and Learning at www.delni.gov.uk.</p>

Useful contacts

Type	Contact	Query
UK learners	T: +44 (0)20 7294 2800 E: learnersupport@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	<ul style="list-style-type: none"> • Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	<ul style="list-style-type: none"> • Re-issue of password or username • Technical problems • Entries • Results • GOLLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	<ul style="list-style-type: none"> • Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	<ul style="list-style-type: none"> • Logbooks • Centre documents • Forms • Free literature

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

**Published by City & Guilds
1 Giltspur Street
London
EC1A 9DD
T +44 (0)20 7294 2800
F +44 (0)20 7294 2400
www.cityandguilds.com**

**City & Guilds is a registered charity
established to promote education
and training**

QH4419-01