

Level 2 NVQ in Advice and Guidance Support (3069)

Optional Units



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Unit AG 13 Enable advice and guidance clients to access referral opportunities

Unit Evidence Requirements

Qualification Title: **Advice and Guidance**

Unit Number: **AG13**

Unit Title: **Enable advice and guidance clients to access referral opportunities**

Evidence Requirements for this unit:

You must provide your assessor with evidence for ALL the performance criteria and ALL the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. directory of other services.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio e.g. case notes, records, referral documents.
- **Questioning:** Questions may be oral or written. In each case the question and your answer

will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Presentation of referral options to clients.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. evaluating the suitability of other services and confirming their capability to meet the clients' requirements.

Unit AG 13 Enable advice and guidance clients to access referral opportunities

Element 13.1 Identify options for referral

You must be able to (performance criteria)

-
- | | |
|---|---|
| 1 | Obtain information from clients on their requirements |
| 2 | Obtain clear, relevant, and current information on other services that are potentially suitable |
-
- | | |
|---|--|
| 3 | Assess the suitability of other services for meeting clients' requirements |
| 4 | Obtain further clarification from clients when the services appear inappropriate |
-
- | | |
|---|--|
| 5 | Confirm the acceptance criteria and procedures of the other services |
|---|--|
-
- | | |
|---|---|
| 6 | Review the requirements of clients and check them against the acceptance criteria of the other services |
|---|---|
-
- | | |
|---|---|
| 7 | Ensure the other services have the capacity and resources to deal with additional clients |
|---|---|
-
- | | |
|---|---|
| 8 | Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements |
|---|---|
-

You must know (knowledge specification)

-
- | | |
|---|---|
| a | what other services are available |
| b | how to obtain information on other services |
| c | what information should be obtained |
| d | what types of information are particularly useful |
-
- | | |
|---|---|
| e | what requirements might be met by other services |
| f | how to evaluate the suitability of other services |
| g | what types of additional information should be obtained |
| h | what other alternatives are available |
-
- | | |
|---|--|
| i | how to obtain information on acceptance criteria |
| j | what the procedures of different services are |
-
- | | |
|---|--|
| k | how to match clients' requirements against acceptance criteria |
|---|--|
-
- | | |
|---|---|
| l | how to check the services' capacity and resources |
|---|---|
-
- | | |
|---|---|
| m | the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection |
| n | why it is important to comply with different requirements |
| o | what the consequences are of not complying with different requirements |
| p | how to obtain information on the requirements |
-

Unit AG 13 Enable advice and guidance clients to access referral opportunities

Element 13.2 Enable clients to take up referral opportunities

You must be able to (performance criteria)	You must know (knowledge specification)
1 Review the referral options with clients	a what information should be reviewed b how to present referral opportunities in a positive manner
2 Identify the advantages and disadvantages of the referral options for the clients	c the potential advantages and disadvantages of different options
3 Provide sufficient information, in an appropriate format, to enable clients to make informed decisions about the referral	d the types of information and how much of will be sufficient for clients to make informed choices e what types of format suit different clients
4 Establish the acceptability of the referral with clients	f how to check clients' views on the referral
5 Provide additional information and support when required by clients	g what objections clients might have to other services h what actions should be taken if clients do not agree the referral i who can provide additional information or support
6 Plan the effective implementation of the referral with the client and facilitate contact with the relevant services	j what the time scales are for different types of referral k what the responsibilities of the services and of the clients are
7 Review the boundaries of confidentiality with clients and inform them of the information that has to be passed between the relevant services	l the relevant rules relating to confidentiality m what information has to be transferred
8 Ensure all relevant referral procedures are completed correctly	n the procedures for referral o what information has to be transferred
9 Agree any further information or support that is required by clients	p what types of support clients require q who might provide additional information or support
10 Record details of the referral in the appropriate systems	r what the systems are for recording referrals and the procedures for using these s why it is important to use the systems

Unit AG 21 Provide and maintain information materials for use in the service

Unit Evidence Requirements

Qualification Title: **Advice and Guidance**

Unit Number: **AG21**

Unit Title: **Provide and maintain information materials for use in the service**

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge. The evidence must be provided in the following ways taking into account any of the special considerations below.

Special Considerations:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in advice and guidance services.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you, e.g. leaflets, posters, directories and listings, computer-based media.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application e.g. Ensuring that service information materials comply with legislative and other requirements, and the consequences of non compliance.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit e.g. evidencing the improvement of information materials.

Unit AG 21

Provide and maintain information materials for use in the service

Element 21.1

Identify the requirements for information materials in the Service

You must be able to (performance criteria)

- 1 Review the information materials currently used by the service and its clients

- 2 Assess how the information materials comply with relevant legislation, codes of practice, guidelines, and ethical requirements

- 3 Identify clearly the way the information materials are used
- 4 Consult with all relevant sources on the effectiveness of the information materials currently used

- 5 Explore the future requirements for information materials

- 6 Identify any trends or developments in the dissemination of information materials

You must know (knowledge specification)

- a what types of information materials are used
- b which aspects of the service do they cover
- c who the clients are who use information materials
- d what format the information materials are in
- e who should be involved in the review of the information materials
- f the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- g why it is important to comply with different requirements
- h what the consequences are of not complying with different requirements
- i how to obtain information on the requirements
- j how many people use the information materials
- k who the clients of the information materials are
- l who can provide information on the use of materials
- m which criteria should be used for evaluating information sources
- n who can provide information on the use of the information materials
- o which potential clients would use the information materials
- p what the potential future requirements of the information materials might be
- q what the seasonal or other variations in demand for information materials might be
- r who can provide information on future requirements
- s what types of trends or developments might occur
- t how to assess the impact of information and communication technologies

7 Identify the resources available for obtaining the information materials

8 Specify clearly the information materials that should be obtained

u which resources might be available

v what the constraints of the resources are

w who requires information on the information materials being obtained

Unit AG 21 Provide and maintain information materials for use in the service

Element 21.2 Obtain information materials for use in the service

You must be able to (performance criteria)

- 1 Determine suitable methods to obtain the information materials
- 2 Comply with procedures for accessing and obtaining information materials
- 3 Ensure the information materials comply with relevant legislation, codes of practice, guidelines, and ethical requirements
- 4 Agree realistic time scales and resources for obtaining the information materials
- 5 Obtain suitable information materials that contribute to the service
- 6 Identify any problems with obtaining the information materials
- 7 Record and store the information materials in the appropriate systems

You must know (knowledge specification)

- a what methods could be available for obtaining information materials
- b what the organisational guidelines and procedures are for accessing and obtaining information materials
- c the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- d why it is important to comply with different requirements
- e what the consequences are of not complying with different requirements
- f how to obtain information on the requirements
- g which factors might affect the time scales for obtaining information materials
- h which resources are required for obtaining information materials
- i how to assess the information materials' contribution to the service
- j what types of problem could occur
- k what actions can be taken to address them
- l why it is important to address problems
- m what the implications are of not addressing the problems
- n what the systems for recording and storing information materials are and the procedures for using these
- o why it is important to use the systems

Unit AG 21 Provide and maintain information materials for use in the service

Element 21.3 Maintain and improve the use of information materials in the service

You must be able to (performance criteria)

- 1 Maintain sufficient sources of freely available information materials to meet the requirements of clients
- 2 Protect information sources effectively from damage and inappropriate use or alteration
- 3 Review all the relevant information collected on the effectiveness of the information materials
- 4 Identify any aspects of the information materials that could be improved
- 5 Assess the overall effectiveness of the information materials against the agreed evaluation criteria
- 6 Identify the most appropriate methods for improving the information materials
- 7 Identify the resources required to implement the improvements
- 8 Present a clear rationale for the improvements and support it with suitable evidence
- 9 Consult with all relevant people on the improvements
- 10 Record the results of the consultation in the appropriate systems
- 11 Ensure the proposed improvements comply with legislation, codes of practice, guidelines, and ethical requirements

You must know (knowledge specification)

- a how often the information materials/ sources should be updated
- b who should be involved in reviewing the information materials and sources
- c how to protect different types and formats of information materials and sources
- d the potential types of damage which could occur to information materials
- e how information sources could be inappropriately used or altered
- f what information can be collected on the effectiveness of the information materials
- g which aspects of the information materials have the potential to be improved
- h how to assess the effectiveness of the information materials
- i what the evaluation criteria are for the effectiveness of the information materials
- j how to improve different types of information materials
- k what types of improvement could be suggested
- l which resources are required to implement different types of improvement
- m why it is important to provide a clear rationale for improvements
- n what types of evidence may be necessary to support the rationale for improvements
- o who should be consulted on improvements to information materials
- p what the systems are for recording evaluations and the procedures relating to the use of these
- q why is it important to use the systems
- r the relevant national, local, professional and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- s why it is important to comply with different requirements
- t what the consequences are of not complying with different requirements
- u how to obtain information on the requirements

Unit 37 Support customer service improvement

Unit Evidence Requirements

Qualification Title: Advice and Guidance Support

Unit Number: Customer Service Unit 37

Unit Title: Support customer service improvements

Evidence Requirements for this unit:

- 1 Your evidence should be collected when carrying out real job, whether paid or voluntary, and when dealing with real clients, whether internal or external to the organisation. For this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different clients on different occasions for your assessor to be confident that you are competent.
- 4 You must prove that you have:
 - a contribute to improving client satisfaction through your own efforts
 - b contributed to improving by working with others
- 5 Your evidence must cover at least two changes with which you have been actively involved. In each case you must be able to identify the part you played in;
 - a linking client feedback with the reasons for the change
 - b implementing the change
 - c gathering client reactions to the change.
- 6 Your evidence for each change must show how:
 - a the changes has improved client satisfaction
 - b your clients have reacted to the change
- 7 Each change that is part of your evidence must be significant enough for regular checks to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned

observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.

- **Witness Testimony**

Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.

- **Work Products:** These are non-confidential records made, or contributed to, by you.

- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application.

- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.

- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit 37 Support customer service improvement

What this unit is about

Organisations change the way they deliver service to their clients because client expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve client satisfaction come from people dealing directly with clients.

If your organisation has decided to make changes, it is your job to support them and to present them positively to your client. Also, by listening to clients comments you may have your own ideas about how the service you deliver could be improved.

This unit is all about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

Unit 37 Support customer service improvement

Customer service standards

To support customer service improvements you must consistently

Element 37.1 Use feedback to Identify potential customer service improvements

You must be able to (performance criteria)

- 1 gather informal feedback from your customer
- 2 use customer feedback procedures to collect information from your customers
- 3 use the information from your customers to develop a better understanding of their customer service experience.
- 4 identify ways the service you give could be improved based on information you have gathered
- 5 share your ideas for improving customer service with colleagues

Element 37.2 Implement change in customer service

You must be able to (performance criteria)

- 1 identify a possible change that could be made to improve customer service
- 2 present your idea for improving customer service to a colleague with the appropriate authority to approve the change
- 3 carry out changes to customer service procedures based on your own idea or proposed by your organisation.
- 4 keep your customer informed of changes to customer service
- 5 give customer a positive impression of changes that have been made
- 6 work positively with others to support customer service changes

Element 37.3 Assist with the evaluation of changes in customer service

You must be able to (performance criteria)

- 1 discuss with others how changes to customer service are working
- 2 work with others to identify any negative effects of changes and how these can be avoided

Unit 37 Support customer service improvement

You must know (knowledge specification)

To be competent at supporting customer service improvements you need to know and understand:

- a how customer experience is influenced by the way service is delivered
- b how customer feedback is obtained
- c how to work with others to identify and support change in the way service is delivered
- d why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them

Key words and phrase

- 1 communicate changes positively
- 2 customer service improvement
- 3 customer feedback
- 4 collect information
- 5 use feedback
- 6 present possibilities for change
- 7 improve service
- 8 share ideas
- 9 implement changes
- 10 monitor changes

Unit 10 Promote additional products or services to customer

Unit Evidence Requirements

Qualification Title: Advice and Guidance Support

Unit Number: Customer Service Unit 10

Unit Title: Promote additional services or products to customers

Evidence Requirements for this unit:

- 1 Your evidence should be collected when carrying out real job, whether paid or voluntary, and when dealing with real clients, whether internal or external to the organisation. For this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public service organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different clients on different occasions for your assessor to be confident that you are competent.
- 4 You must prove evidence that additional services or products offered include:
 - a Use of service or products that are new to your client
 - b Additional use of services or products that your client has used before
- 5 Your evidence must show that you:
 - a Follow organisational procedures for offering additional services or products to your client
 - b Create opportunities for encouraging your clients to use additional services or products
 - c Identify what your client wants by seeking information directly
 - d Identify what your client wants from spontaneous client comments
- 6 Your communication with clients may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the

elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.

- **Witness Testimony**

Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.

- **Work Products:** These are non-confidential records made, or contributed to, by you.

- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.

- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application.

- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.

- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit 10 Promote additional products or services to customer

What this unit is about

Services or products are continually changing in organisations to keep up with clients' expectations. By offering new or improved services and products your organisation can increase client satisfaction. Many organisations must promote these to be able to survive in a competitive world. However, it is equally important for organisations that are not in a competitive environment to encourage their client to try new services or products.

This unit is all about your need to keep pace with new developments and to encourage your clients to take an interest in them. Clients expect more and more services or products to be offered to meet their own growing expectations. They need to be made aware of what is available from your organisation to give them a greater choice.

Because of this everybody offering services or products needs to play a part in making clients aware of what is available.

Unit 10 Promote additional products or services to customer

Customer service standards

When you promote additional services or products to customers you must consistently

Element 10.1 Identify additional services or products that are available

You must be able to (performance criteria)

- 1 update and develop your knowledge of your organisation's services or products
- 2 check with others when you are unsure of new service or product details
- 3 identify appropriate service or products that may interest your customer
- 4 spot opportunities for offering your additional services or products that will improve their customer experience.

Element 10.2 Inform customers about additional service or products

You must be able to (performance criteria)

- 1 choose the most appropriate time to inform your customer about additional service or products
- 2 choose the most appropriate method of communication to introduce your customer to additional service or products
- 3 give your customer accurate and sufficient information to enable them to make a decision about the additional services or products
- 4 give your customer time to ask questions about the additional services or products

Element 10.3 Gain customer commitment to using additional services or products

You must be able to (performance criteria)

- 1 Close the discussion appropriately If your customer shows no interest
- 2 Give relevant information to move the situation forward when your customers shows interest
- 3 Secure customer agreement and check customer understanding of the delivery of the service or product
- 4 Take action to ensure prompt delivery of the additional services or products to your customer
- 5 Refer your customer to others or to alternative sources of information if the additional services or products are not your responsibility

Unit 37 Promote additional products or services to customer

You must know (knowledge specification)

To be competent at supporting customer service improvements you need to know and understand:

- a your organisation's procedure and systems for encouraging the use of additional service or products
- b how the use of additional services or products will benefit your customers
- c how your customer's use of additional services or products will benefit your organisation
- d the main factors that influence customers to use your services or products
- e how to introduce additional services or products to customer outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- f how to give appropriate, balanced information to customers about services or products

Key words and phrase

- 1 promote additional services
- 2 promote additional products
- 3 give information
- 4 listen
- 5 close discussion
- 6 refer customer
- 7 secure agreement
- 8 take prompt action
- 9 identify opportunities

Unit 11 Process customer service information

Unit Evidence Requirements

Qualification Title: Advice and Guidance Support

Unit Number: Customer Service Unit 11

Unit Title: Process customer service information

Evidence Requirements for this unit:

- 1 Your evidence should be collected when carrying out real job, whether paid or voluntary, and when dealing with real clients, whether internal or external to the organisation. For this unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit
- 2 You may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different clients on different occasions for your assessor to be confident that you are competent.
- 4 Organisations use different methods to store information. Your evidence must be demonstrated by using the method that is most appropriate for your organisation.
- 5 Your evidence must prove that you have processed client information for a variety of customers with different requirements.
 - a new clients
 - b returning clients
- 6 Your evidence must show that you have:
 - a Checked whether the information you are collecting and retrieving is accurate and up to date
 - b Selected information that is directly relevant to each of your clients
- 7 Your communication with clients may be face to face, in writing, by telephone, text message, e-mail, internet, intranet or by any other method you would be expected to use within your job role.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony** Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.

- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.
- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application.
- Original **Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit 11 Process customer service information

What this unit is about

You and your organisation need customer service information to answer clients' questions and to respond to clients' request. Information about clients is also used by your organisation to develop services. Some information is collected from your clients. Other information is collected through information systems and equipment that make records of service delivery. In either case you must collect information, retrieve it and supply it when appropriate.

Good information provides a sound basis for all client transactions.

The quality of information depends heavily on the skills and attention to detail of the person dealing with the information.

Unit 11 Process customer service information

Customer service standards

When you process customer service information you must consistently

Element 11.1 Collect customer service information

You must be able to (performance criteria)

- 1 collect and record new customer service information following your organisation's guidelines
- 2 update existing customer service information
- 3 record and store customer service information that is accurate, sufficient and relevant following organisational guidelines

Element 11.2 Select and retrieve customer service information

You must be able to (performance criteria)

- 1 Respond promptly to request for customer service information
- 2 Select and retrieve relevant information for customers or colleagues following your organisation's guidelines

Element 11.3 Supply customer service information

You must be able to (performance criteria)

- 1 Supply accurate and sufficient customer service information to meet your customers or colleagues' expectations
- 2 Choose the most appropriate way to supply information to your customers or colleagues
- 3 Confirm that your customers or colleagues have received and understood the customer service information

Unit 11 Process customer service information

You must know (knowledge specification)

To be competent at processing customer service information you need to know and understand:

- a your organisation's procedures and guidelines for collecting, retrieving and supplying customer service information
- b how to collect customer service information efficiently and effectively
- c how to operate the customer service information storage system
- d why processing customer service information correctly makes an important contribution to effective customer service
- e the importance of attention to detail when processing customer service information
- f legal and regulatory restrictions on the storage of data

Key words and phrase

- 1 collect information
- 2 record information
- 3 ensure accuracy of information
- 4 store information
- 5 answer questions
- 6 retrieve information
- 7 select information
- 8 supply information

Unit HSC240 **Contribute to the identification of the risk of danger to individual and others**

Unit Evidence Requirements

Qualification Title: **Advice and Guidance Support**

Unit Number: **Health and Social Care Unit 240**

Unit Title: **Contribute to the identification of the risk of danger to individuals and others**

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and all the knowledge and those parts of the scope that are applicable to your work.

The evidence must be provided in the following ways taking into account any of the special considerations below.

Special consideration:

Simulation **is not permitted** for this unit.

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in Advice and Guidance.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony** occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit HSC240 Contribute to the identification of the risk of danger to individual and others

Element of competence

HSC240a	contribute to recognising risks of harm and abuse
HSC240b	take action to deal with risks of harm and abuse
HSC240c	contribute to reviewing the effectiveness of actions taken to deal with risks of harm and abuse

About this unit

For this unit you need to contribute to identifying potential harm and abuse to individuals and others, take action to deal with the risk of danger and contribute to reviewing the effectiveness of actions to deal with the risk of danger of harm and abuse to individuals and others.

Scope

The scope is here to give you guidance on possible areas to be covered in this unit. The terms in this section give you a list of options linked with items in the performance criteria. You need to provide evidence for any option related to your work area.

Harm could be/have been: short term; medium term; long term and can be intentional; unintentional.

Key people: family; friends; carers; others with whom the individual has a supportive relationship.

Ways that may prejudice future investigations could include: asking inappropriate and/or leading questions; not following organisational and legal procedures; putting undue pressure on individuals.

Your **knowledge and understanding** will be specifically related to legal requirements and codes of practice applicable to your job; your work activities; the job you are doing and the individuals you are working with.

Unit HSC240 Contribute to the identification of the risk of danger to individual and others

Key Words and Concepts

This section provides explanations and definitions of the key words and concepts used in this unit. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way.

Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required

Abuse	Abuse is causing physical, emotional and/or sexual harm to an individual and/or failing/neglecting to protect them from harm
Active support	Support that encourages individuals to do as much for themselves as possible to maintain their independence and physical ability and encourages people with disabilities to maximise their own potential and independence
Harm	The effects of an individual being physically, emotionally or sexually injured or abused
Individuals	The actual people requiring advice and guidance services. Where individuals use advocates and interpreters to enable them to express their views, wishes or feelings and to speak on their behalf, the term individual within this standard covers the individual and their advocate or interpreter
Key people	Are those people who are key to an individual's well-being.
Others	Are other people within and outside your organisation that are necessary for you to fulfil your job role
Rights	<ul style="list-style-type: none">• The rights that individuals have to:• be respected• be treated equally and not be discriminated against• be treated as an individual• be treated in a dignified way• privacy• be protected from danger and harm• be cared for in a way they choose• access information about themselves• communicate using their preferred methods of communication and language

Unit HSC240 Contribute to the identification of the risk of danger to individual and others

HSC240a Contribute to recognising risks of harm and abuse

Performance Criteria

You need to show that.

- 1 You Identify and access information and advice about potential risks of **harm** and **abuse** to **individuals, key people** and **others**
- 2 You contribute to the identification of factors that might lead to the risk of harm and abuse to individuals, key people and others
- 3 You identify signs and symptoms that individuals are:
 - a in danger of being harmed and/or abused
 - b are being harmed and/or abused
 - c have been harmed and/or abused in the past
- 4 You support individuals to identify signs and symptoms that might lead to harm and abuse of themselves and others
- 5 You report any suspicions of harm and abuse to the appropriate people and organisations:
 - a ensuring that your actions do not contaminate any evidence or prejudice future investigations
 - b within confidentiality agreements
 - c according to legal and organisational requirements

HSC240b Take action to deal with risks of harm and abuse

Performance Criteria

You need to show that.

- 1 you develop a positive, honest, trusting and sensitive relationship with individuals that will enable them to discuss their fears and knowledge of potential and actual danger
- 2 you encourage individuals to talk about their experiences in ways that will not contaminate evidence or prejudice future investigations
- 3 you clarify the actions you have to take about disclosures of harm and abuse
- 4 you treat individuals with respect and dignity assuring them that you have taken the information they have provided seriously
- 5 you inform relevant people, as required by the legal and organisational requirements, about any disclosures or concerns about harm and abuse
- 6 you seek support for your own personal emotional reactions to the disclosure
- 7 you record and report in detail any disclosures:
 - a ensuring that your actions do not contaminate any evidence or prejudice future investigations
 - b within confidentiality agreements
 - c according to legal and organisational requirements

Performance Criteria**You need to show that.**

- 1 you work sensitively to support and encourage individuals to participate in the review of actions, processes, procedures and practices for dealing with the risk of danger, harm and abuse
- 2 you agree your role and responsibilities and the roles and responsibilities of others in reviewing the effectiveness of actions to deal with the risk of danger, harm and abuse
- 3 you carry out your role and responsibilities in reviewing the effectiveness of actions to deal with the risk of danger
- 4 you work with all involved to collect information and feedback to allow a systematic review of the actions to deal with the risk of danger, harm and abuse
- 5 you record and report on the process and outcomes of the review:
 - a ensuring that your actions do not contaminate any evidence or prejudice future investigations
 - b within confidentiality agreements
 - c according to legal and organisational requirements

Unit HSC240 Contribute to the identification of the risk of danger to individual and others

Knowledge specification for the whole of this unit

Competent practice is a combination of the application of skills and knowledge informed by values and ethics. This specification details the knowledge and understanding required to carry out competent practice in the performance described in this unit.

When using this specification **it is important to read the knowledge requirements in relation to expectations and requirements of your job role.**

You need to show that you know, understand and can apply in practice:

Values

- 1 legal and organisational requirements on equality, diversity, discrimination and **rights** when contributing to the identification of the risk of danger to individuals and others
- 2 how to provide **active support** and promote the individual's rights, choices and well-being when contributing to the identification of the risk of danger to themselves and others
- 3 the rights of individuals to refuse to participate in investigations related to risk of danger, harm and abuse to individuals, key people and others

Legislation and organisational policy and procedures

- 4 codes of practice and conduct, and standards and guidance relevant to your own and others the roles, responsibilities, accountability and duties when identifying and dealing with the risk of danger, harm and abuse
- 5 current local, UK and European legislation, and organisational requirements, procedures and practices for:
 - a accessing records
 - b recording, reporting, confidentiality and sharing information, including data protection
 - c health, safety, assessing and managing risks associated with identifying and dealing with the risk of danger, harm and abuse to individuals and others
 - d the identification of the risk of danger to individuals and others

Theory and practice

- 6 factors that can make it difficult for you, key people and others to recognise danger, harm and abuse to individuals
- 7 types of relationships:
 - a where individuals feel they can confide what is happening/has happened to them
 - b that support individuals to cope with what has happened to them
- 8 ways of working with individuals who are distressed, fearful and/or uncertain about what will happen to them
- 9 the effects that being at risk of harm and/or abuse and/or having been harmed and/or abused can have on the individuals' social and emotional behaviour, their health and their physical well-being
- 10 any special provisions relating to the individuals' conditions
- 11 how people carrying out abuse conceal what is happening

- 12 the types of evidence that are valid in court and how to ensure that evidence required in investigations is not contaminated by your actions.

Unit HSC241 **Contribute to the effectiveness of teams**

Unit Evidence Requirements

Qualification Title: **Advice and Guidance Support**

Unit Number: **Health and Social Care Unit 241**

Unit Title: **Contribute to the effectiveness of teams**

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge and those parts of the scope that are applicable to your work.

The evidence must be provided in the following ways taking into account any of the special considerations below.

Special consideration:

Simulation **is not permitted** for this unit

The nature of this unit means that **most** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in Advice and Guidance.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records in your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit HSC241 Contribute to the effectiveness of teams

Element of competence

HSC241a Agree and carry out your role and responsibilities within the team

HSC241b Participate effectively as team member

About this unit

For this unit you need to participate effectively as a member of a team.

Scope

The scope is here to give you guidance on possible areas to be covered in this unit. The terms in this section give you a list of options linked with items in the performance criteria. You need to provide evidence for any option related to your work area.

Team: work team, a multi disciplinary team, broader multi agency team.

Your **knowledge and understanding** will be specifically related to legal requirements and codes of practice applicable to your job; your work activities; the job you are doing and the individuals you are working with.

Unit HSC241 Contribute to the effectiveness of teams

Key Words and Concepts

This section provides explanations and definitions of the key words and concepts used in this unit. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way.

Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required

Behaviour Action and communication by a person

Others Are other people within a outside your organisation that are necessary for you to Ifil your job role

Rights The rights that individuals have to:

- be respected
- be treated equally and not be discriminated against
- be treated as an individual
- be treated in a dignified way
- privacy
- be protected from danger and harm
- be cared for in a way they choose
- access information about themselves
- communicate using their preferred methods of communication and language

Team A group of people working together for a specific purpose

Unit HSC241 Contribute to the effectiveness of team

HSC241a Agree and carry out your role and responsibilities within the team

Performance Criteria

You need to show that.

- 1 you review information and seek advice about the **team**, its objectives and its purpose
- 2 you work with others within the team to identify, agree and clarify:
 - a your role and responsibilities
 - b the roles and responsibilities of **others**
 - c how your role and responsibilities contribute to the overall objectives and purpose of the team
 - d how you can and should contribute to team activities, objectives and purposes
- 3 you carry out your agreed role and responsibilities within the team
- 4 you evaluate and use feedback from others constructively, to enable you to carry out your role and responsibilities within the team more effectively
- 5 you agree, seek support and take responsibility for any development and learning that will enable you to carry out your role and responsibilities within the team more effectively

Unit HSC241 Contribute to the effectiveness of teams

HSC241b Participate effectively as a team member

Performance Criteria

You need to show that.

- 1 you inform other members of the team of your activities
- 2 your **behaviour** to others in the team supports the effective functioning of the team
- 3 you accept and use suggestions and information offered by others constructively to improve your practice within the team
- 4 you offer supportive and constructive assistance to team members
- 5 you complete your commitments to other team members effectively and according to overall work priorities
- 6 when you cannot complete any commitments with timescales specified you immediately inform appropriate team members
- 7 you present suggestions and offer ideas and information to benefit team members and improve team working
- 8 you deal with differences of opinion and conflicts constructively and in ways which respects other team members' points of view
- 9 where you experience problems in working effectively with other team members, you seek appropriate advice and guidance

Unit HSC241 Contribute to the effectiveness of teams

Knowledge specification for the whole of this unit

Competent practice is a combination of the application of skills and knowledge informed by values and ethics. This specification details the knowledge and understanding required to carry out competent practice in the performance described in this unit.

When using this specification **it is important to read the knowledge requirements in relation to expectations and requirements of your job role.**

You need to show that you know, understand and can apply in practice:

Values

- 1 legal and organisational requirements on equality, diversity, discrimination and **rights** when working in teams

Legislation and organisational policy and procedures

- 2 codes of practice and conduct, and standards and guidance relevant to your own and other roles, responsibilities, accountability and duties when working in teams to support individuals
- 3 current local, UK and European legislation, and organisational requirements, procedures and practices for:
 - a accessing records
 - b recording, reporting, confidentiality and sharing information, including data protection
 - c team working
- 4 how to access up-to-date copies of the organisation's workplace policies, procedures and systems, and practice and service standards related to team working

Theory and practice

- 5 principles that underpin effective team working
- 6 individuals' styles of interaction and how these can affect team working :
- 7 barriers to developing relationships within the team and how these can be overcome
- 8 problems which may be encountered when relating to and interacting with other team members and how these can best be handled
- 9 your own strengths and weaknesses as an individual worker and as a team member
- 10 development and learning opportunities available to support you in team working activities

Unit HSC242 Receive and pass on messages and information

Unit Evidence Requirements

Qualification Title: **Advice and Guidance Support**

Unit Number: **Health and Social Care Unit 242**

Unit Title: **Receive and pass on messages and information**

Evidence Requirements for this unit:

You must provide your assessor with evidence for **all** the performance criteria and **all** the knowledge and those parts of the scope that are applicable to your work.

The evidence must be provided in the following ways taking into account any of the special considerations below.

Special consideration:

Simulation **is not permitted** for this unit

The nature of this unit means that **all** of your evidence must come from real work activities.

The evidence must reflect, at all times, the policies and procedures of the workplace, as linked to current legislation and the values and principles for good practice in Advice and Guidance.

Sources of performance and knowledge evidence:

Your assessor will identify the most reliable and efficient mix of evidence gathering methods from the list below. This will ensure that all the performance criteria and knowledge requirements are met and that the consistency of your performance can be established.

- **Observation** is the most reliable and efficient assessment/ evidence gathering method. For this reason your assessor is likely to use it wherever appropriate. A well planned observation can provide most of the evidence for the performance criteria in all the elements in the unit. Your assessor will also decide what knowledge and understanding you have demonstrated through your performance.
- **Witness Testimony**
Occupational experts, colleagues, allied professionals and clients may be able to provide testimony of your performance. Your assessor will help you to identify the appropriate use of witnesses.
- **Work Products:** These are non-confidential records made, or contributed to, by you.
- **Confidential Records:** These may be used as evidence but must not be placed in your portfolio. They must remain in their usual location and be referred to in the assessor records

in your portfolio.

- **Questioning:** Questions may be oral or written. In each case the question and your answer will need to be recorded.
- **Professional discussion:** This should be in the form of a structured review of your practice with the outcomes captured by means of audiotape or a written summary. These are particularly useful to provide evidence that you know and understand principles which support practice; policies, procedures and legislation, and that you can critically evaluate their application.
- **Original Certificates:** Certificates of training and records of attendance must be authentic, current and valid. Your assessor will also want to check the content of such training so that this can be matched to the standards and check that you have retained and can apply learning to practice.
- **Case Studies, projects, assignments and candidate/reflective accounts of your work:** These methods are most appropriately used to cover any outstanding areas in the knowledge requirement of your qualification. Occasionally, because an event happens rarely or may be difficult to observe, you may be able to use a candidate/ reflective account to provide some of the performance evidence for this unit.

Unit HSC242 Receive and pass on messages and information

Element of competence

HSC242a	Receive, process and record messages
HSC242b	Pass on messages
HSC242c	Respond to request for information

About this unit

For this unit you will need to take, record and pass on messages and information

Scope

The scope is here to give you guidance on possible areas to be covered in this unit. The terms in this section give you a list of options linked with items in the performance criteria. You need to provide evidence for any option related to your work area.

Forms of communication can include: emails, telephone, written information and verbal information

Communication and language needs and preferences include: the preferred spoken language and mode of communication appropriate to the receiver. This will include the use of signs: symbols: pictures: writing: objects of reference: communication passports; other non verbal forms of communication; human and technological aids to communication.

Key people: family; friends; carers; others with whom the individual has a supportive relationship.

Your **knowledge and understanding** will be specifically related to legal requirements and codes of practice applicable to your job; your work activities; the job you are doing and the individuals you are working with.

Unit HSC242 Receive and pass on messages and information

Key Words and Concepts

This section provides explanations and definitions of the key words and concepts used in this unit. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way.

Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required

Forms /Methods of communication

These include the type of communication individuals, key people and others within and outside your organisation use, for sending and receiving messages and information.

Individuals

The actual people requiring advice and guidance services. Where individuals use advocates and interpreters to enable them to express their views, wishes or feelings and to speak on their behalf, the term individual within this standard covers the individual and their advocate or interpreter

Key people

Are those people who are key to an individual's well-being.

Messages

Any form of communication from and about individuals, key people and other people and organisations. Messages might be information about legislation or working practices which should be passed on and which your organisation may have procedures set in place to process immediately

Others

Are other people within and outside your organisation that are necessary for you to fulfil your job role

Rights

- The rights that individuals have to:
- be respected
- be treated equally and not be discriminated against
- be treated as an individual
- be treated in a dignified way
- privacy
- be protected from danger and harm
- be cared for in a way that meets their needs, takes account of their choices and also protects them
- access information about themselves
- communicate using their preferred methods of communication and language

Unit HSC242 Receive and pass on messages and information

HSC242a Receive, process and record messages

Performance Criteria

You need to show that.

- 1 you receive written and verbal information, and **messages** that use **other forms of communication from** individuals, **key people** and **others**
- 2 you identify the urgency of the messages, ensuring that urgent messages are dealt with immediately
- 3 you follow legal and organisational procedures and practices to process messages
- 4 you seek extra help where you are unable to process the message because of its complexity, its clarity or because it is communicated in a form or language that you are unable to process
- 5 you record messages accurately, within confidentiality agreements and according to legal and organisational requirements, procedures and practices
- 6 if you have had to access records and reports, you return and file them correctly, ensuring that people who do not have a right to access the information cannot do so
- 7 you use appropriate procedures to file, store and share messages and information within confidentiality agreements and according to legal and organisational requirements
- 8 you take appropriate action to resolve difficulties you have had in receiving and recording information

Unit HSC242 Receive and pass on messages and information

HSC242b Pass on messages

Performance Criteria

You need to show that.

- 1 you identify who needs to be informed of the messages received and processed
- 2 you clarify to whom you need to pass on messages, when you are unsure who should receive the messages
- 3 you pass on messages:
 - a according to instructions
 - b taking account of the urgency of the message
 - c within confidentiality agreements
 - d according to legal and organisational requirements
- 4 you use appropriate procedures and communication methods for passing on information for individuals, key people and others within and outside your organisation
- 5 you share messages and information with others within and outside your organisation, according to confidentiality agreements, legal and organisational requirements
- 6 you record, report, store and share information about:
 - a what you have done with the messages
 - b whom you have passed them towithin confidentiality agreement and according to legal and organisational procedures and requirements
- 7 you report any difficulties you have in passing on messages promptly to the appropriate people and organisations

Unit HSC242 Receive and pass on messages and information

HSC242c Respond to request for information

Performance Criteria

You need to show that.

- 1 you respond to requests for information:
 - a at the appropriate time
 - b according to instructions
 - c using an appropriate means of communication and language
 within confidentiality agreements and according to legal and organisational procedures and requirements
- 2 you take appropriate action if you cannot deal with the request for information because of:
 - a the nature and complexity of the request
 - b confidentiality issues about the request
- 3 if you need to access records and reports, you return and file them correctly, ensuring that people who do not have a right to access the information cannot do so
- 4 you identify and use appropriate procedures to file, store and share requests within confidentiality agreements and according to legal and organisational requirements
- 5 you record and report on the actions taken:
 - a to deal with the request
 - b when you are unable to deal with the request within confidentiality agreements and according to legal and organisational requirements and procedures

Knowledge specification for the whole of this unit

Competent practice is a combination of the application of skills and knowledge informed by values and ethics. This specification details the knowledge and understanding required to carry out competent practice in the performance described in this unit.

When using this specification **it is important to read the knowledge requirements in relation to expectations and requirements of your job role.**

You need to show that you know, understand and can apply in practice:

Values

- 1 legal and organisational requirements on equality, diversity, discrimination and **rights** confidentiality and sharing of information when receiving and passing on messages and information

Legislation and organisational policy and procedures

- 2 codes of practice and conduct, and standards and guidance relevant to your own and others roles, responsibilities, accountability and duties when receiving and passing on messages and information
- 3 current local, UK and European legislation, and organisational requirements, procedures and practices for:
 - a accessing records and information
 - b recording, reporting, confidentiality and sharing information, including data protection
 - c receiving and passing on messages

Theory and practice

- 4 actions to take when messages and information are received on any changes in the conditions and circumstances of individuals
- 5 principles involved in the sharing, storing, retrieving and security of information, records and reports
- 6 why records which are confidential should be marked to indicate this
- 7 why it is important to:
 - a accurately record information received
 - b file records again correctly after use
 - c take messages accurately and the potential effects of not so doing
 - d take account of the importance and urgency of the message
- 8 the different purposes for which information may be required and the degree of detail necessary for these different purposes
- 9 how to manage sensitive information
- 10 the sort of problems which may arise during the maintenance, storage and retrieval of records and the reasons for reporting these without delay
- 11 methods of modifying communications appropriate to the individual concerned
- 12 the different methods of obtaining information and those which are appropriate to different circumstances and/or different information

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