# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

## Unit overview

### Elements of competence

413a    Promote the health and care services offered by your organisation
413b    Evaluate your organisation's ability and willingness to provide health and care services for individuals
413c    Process successful requests for health and care services

### About this unit

For this unit you will be responsible for managing requests for health and care services and deciding how the health and care services will be delivered by your organisation.

### 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.

**Communicate** using: the individual's preferred spoken language; 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** include: family; friends; carers; others with whom the individual has a supportive relationship.

**Resources** could refer to: your own skills and time; time and skills of other workers; services or support available in or outside of your own organisation; support from within the individual's own network or finances; goods and services.

**Risks** could include the possibility of: danger, damage and destruction to the environment and goods; injury and harm to people; self-harm; bullying; abuse; reckless behaviour.

**Services and facilities** could include: services provided to an individuals home (eg meals on wheels, services to meet the individuals personal care needs; therapeutic services); services provided to enable individuals to meet their social care needs (eg transport); amenities outside the individual's place of residence (eg day care provision; support groups).

Your **knowledge and understanding** for this unit will relate to legal requirements and codes of practice applicable to the scope of your work and that of others with whom you work; your role, and level of responsibility you have within your organisation to manage activities to achieve an optimum service; the depth and breadth of understanding that will enable you carry out your job role and support others to perform competently; the need to be able to solve problems and resolve conflicts; the need to be able to evaluate, assess situations and act appropriately; systems and processes within your own and across other organisations and the need for you to be able to work in collaboration with individuals[1], key people and others within and outside your organisation.

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[1] If you are working with children and young people the term "individuals" covers children and young people and "key people" covers parents, families, carers, friends and others with whom the child/young person has a supportive relationship

## 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

**Values underpinning the whole of the unit**

The values underpinning this unit have been derived from the key purpose statement[2], the statement of expectations from carers and people receiving services, relevant service standards and codes of practice for health and social care in the four UK countries.  If you are working with children and young people they can be found in the principles of care unit 44.  If you are working with adults they can be found in unit 45.  To achieve this unit you must demonstrate that you have applied the principles of care outlined in either unit 44 or unit 45 in your practice and through your knowledge.

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[2]The key purpose identified for those working in health and social care settings is "to provide an integrated, ethical and inclusive service, which meets agreed needs and outcomes of people requiring health and/or social care"

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

## 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**.

| | |
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| **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 |
| **Individuals** | The actual people requiring health and care 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 health and social well-being. These are people in the individual's life who can make a difference to their health and well-being |
| **Others** | Are other people within and outside your organisation that are necessary for you to fulfil your job role |
| **Resources** | The human, physical and financial resources available to meet the health and social care needs of individuals |

**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

| | |
|---|---|
| **Risks** | The likelihood of danger, harm or abuse arising from anything or anyone |
| **Services and facilities** | Support for individuals that is provided by your own and other organisations |

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

413a        Promote the health and care services offered by your organisation

## Performance criteria

You need to show that:

1    You ensure that you have sufficient and appropriate information to enable people to understand and make decisions about the appropriateness of the health and care services your organisation offers for **individuals**

2    You ensure that any information you provide:
   - meets legal, organisational and any service requirements
   - is in an appropriate format, language and media that **individuals** and **key people** can understand
   - is updated regularly and is in places that are regularly accessed by individuals and key people

3    You maintain contact and keep people from other organisations who might wish to purchase your services up-to-date with the health and care services your organisation can offer

4    You arrange appointments and visits for people who wish to examine and decide about the appropriateness of the health and care services your organisation provides

5    You provide **active support** to enable individuals and key people to identify and communicate the specific health and care services they may require and understand if, and how your organisation could meet those requirements

6    You make and take opportunities to promote the quality of the service your organisation provides with individuals, key people and people from other organisations and services

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

413b        Evaluate your organisation's ability and willingness to provide health and care services for individuals

## Performance criteria

You need to show that:

1    You receive and evaluate requests for health and care services to establish whether your organisation is able to provide the services requested

2    You immediately inform those requesting the services if your organisation is unable to provide the health and care services requested and provide information about other possible services

3    Where the initial information is insufficient, you request further specific information about the services required to enable you to evaluate your organisation's ability and willingness to provide the services requested

4    You clarify the urgency of requests and schedule evaluations according to needs and any risks that might be caused by delays

5    You ensure that you have appropriate staff and **resources** to meet the needs of individuals for which you agree to provide health and care services

6    You support individuals, key people and **others** to understand:
   • the processes involved in evaluating whether your organisation can and is willing to meet individuals' health and care needs
   • your role and the role of others in evaluating whether your organisation can and is willing to meet individuals' health and care needs
   • how and when the outcomes of the evaluation will be communicated to individuals, key people and others from outside your organisation
   • any options or alternative services that are available to individuals

7    You deal with information according to confidentiality agreements

8    You record and report clearly, accurately and concisely on the details of evaluation and its outcomes and the rationale for your decisions and actions:
   • within confidentiality agreements
   • according to legal and organisational requirements
   • in ways and at a level that can be understood by all who need and have a right to access the records and reports

9    You confirm and agree the outcomes of the evaluation with appropriate people and according to legal and organisational requirements

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

## 413c Process successful requests for health and care services

### Performance criteria

You need to show that:

1   You inform individuals, key people and others that your organisation is able to provide the health and care services they require

2   You identify with individuals, key people and others the preferred options for the delivery of health and care services

3   You provide **active support** to enable individuals, key people and others, to agree:
    * how the delivery of the health and care services will be resourced
    * how and by whom the health and care services will be delivered and evaluated
    * how they can provide feedback on the quality of health and care services in meeting the needs and preferences of individuals, the timescales for delivery of health and care services
    * any specialist input and support that will be required to deliver the health and care services required by individuals
    * how **risks** will be managed
    * how problems will be handled
    * how the package will be monitored, evaluated and quality assured

4   You support individuals and key people to understand your role and the roles of others in delivering and evaluating the health and care services for individuals

5   You identify, and where possible, resolve issues that might lead to conflict

6   You ensure that you, individuals, key people and others from within and outside your organisation have correctly completed necessary paperwork

7   You ensure that all who are required to, have accessible and understandable copies of documents to support the delivery of the health and care services

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

## 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 for 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.**

### Values

1   Legal and organisational requirements on equality, diversity, discrimination, **rights**, confidentiality and sharing of information when promoting your organisation and managing requests for health and care services
2   Knowledge and practice that underpin the holistic person centred approach which enable you to work in ways that:
 • place the individual's preferences and best interests at the centre of everything you do
 • provide active support for individuals
 • recognise the uniqueness of individuals and their circumstances
 • empower individuals to take responsibility (as far as they are able and within any restrictions placed upon them), and make and communicate their own decisions about their lives, actions and risks when promoting your organisation and managing requests for health and care services
3   How to evaluate and manage requests for services fairly and ethically
4   How to manage ethical dilemmas and conflicts for individuals, those who use services and staff/colleagues when promoting your organisation and managing requests for care services
5   How to challenge, and to support individuals, key people and others to challenge information, documents, systems, structures, procedures and practices that are discriminatory when promoting your organisation and managing requests for health and care services

### Legislation and organisational policy and procedures

6   Codes of practice and conduct, and standards and guidance relevant to your setting and the roles, responsibilities, accountability and duties of others when promoting your organisation and managing requests for health and care services
7   Current local, UK and European legislation and organisational requirements, procedures and practices for:
 • data protection
 • health and safety
 • risk assessment and management
 • employment practices
 • protecting individuals from danger, harm and abuse
 • making and dealing with complaints and whistle blowing
 • multi-disciplinary and multi-agency working
 • working in integrated ways to promote individuals' well-being
 • promoting your organisation's services and facilities
 • managing and processing requests for health and care services, and the parameters for accepting or rejecting requests for your organisation
8   Key government initiatives which affect the management of requests for health and care services
9   How to access, evaluate and influence organisational and workplace policies, procedures and systems for managing requests for health and care services

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

## Knowledge specification for the whole of this unit (continued)

10  How to access and record information, decisions and judgements when managing requests for health and care services, electronically and manually

11  How different philosophies, principles, priorities and codes of practice can affect inter-agency and partnership working when managing requests for health and care services

12  The resources available within and outside your organisation to provide health and care services that are flexible and person-centred

13  Policies, procedures, guidance and protocols with the other organisations and professions with whom you work

### Theory and practice

14  How and where to access literature, information and support to inform your practice for promoting your organisation and managing requests for health and care services

15  An up-to-date knowledge of literature related to best practice in promoting your organisation and evaluating, managing and processing requests for health and care services

16  An up-to-date knowledge of government reports, inquiries and research relevant to managing and processing requests for health and care services

17  Theories about:
  • power and influence that can be used and abused when managing and processing requests for health and care services
  • multi-disciplinary and multi-organisational working
  • organisational methods, systems and structures

18  Knowledge of the physical and mental health conditions you are likely to have to work with and make judgements about when managing and processing requests for services

19  Type of information required to promote your organisation and the services and facilities it offers and how to evaluate the effectiveness of the information

20  Methods of promoting your organisation and the services and facilities it offers

21  Ways of working with people who may purchase the health and care services of your organisation

22  Why it is important to inform people and organisations immediately their request has been rejected

23  Factors that you need to take account of when accepting and rejecting people's requests for health and care services

24  Methods of working with, and resolving conflicts and ethical dilemmas that you are likely to meet when accepting and rejecting people for health and care services that your organisation can offer

25  How and where information communication technologies can and should be used when managing and processing requests for services

26  The factors to take account of when evaluating whether your organisation has the resources (human, physical and financial) to provide the services and facilities requested

27  Methods of supporting individuals and key people to express their wishes, needs and preferences about the delivery of services and facilities

28  Methods of supporting staff to work with individuals, key people and others to deliver and evaluate the agreed services and facilities

29  The stages, procedures, paperwork and people involved in processing requests for health and care services, for requests that have been rejected and those that have been accepted

30  The use of evidence, fact and knowledge based opinions in records and reports and why it is important to differentiate between these and make clear the source of evidence

# 413 MANAGE REQUESTS FOR HEALTH AND CARE SERVICES

## Evidence requirements for this unit:

- Direct observation by assessor and/or an expert witness is required for some of the performance criteria for every element in this unit.
- Prior to commencing the unit you should agree a plan with your assessor regarding the types of evidence to be used.
- You must provide your assessor with evidence for ALL the performance criteria and ALL the knowledge requirements and the relevant parts of the SCOPE as applicable to your workplace.
- The evidence must, at all times, reflect the policies and procedures of the workplaces as linked to current legislation and valued and principles for best practice within the Health and Social Care Sector. This will include the National Service Standards for your area of work or client group.
- All evidence should relate to real work activities for ALL elements of this unit.
- Simulation is NOT permitted for this unit.

**Competences can be demonstrated using a variety of types of evidence from the following:**
- **Work products:** these can be any record that you would normally use within your normal role eg policies and procedures and mission statement; reports and records; minutes of meetings; communication records, etc.
- **Assignment/project:** you may have already completed a project or assignment (for example from HNC, NC, VRQ, BTec courses, D32, 33, 34, A1 and V1). You could also use evidence of previous in-house training course/programmes you have completed showing professional development.
- **Reflective accounts:** you describe your actions in a particular situation(s) and reflect on the reason(s) for you practicing in that way, in relation to individuals.
- **Questioning:** you and your assessor may agree on questions to demonstrate your knowledge, to supplement the knowledge demonstrated through observations, products and reflective accounts. These can be oral or written but evidence of this must be recorded.

NB **Confidential records do not require to be included in your portfolio of evidence. These can remain where they are normally stored and checked by your assessor and internal verifier. If they are included, they must be anonymised.**