

Integrated Urgent Care / NHS 111 Workforce Blueprint



Career Framework and Competency Based Job Descriptions Skills for Health Levels 2-6

Introduction

Career Framework and Competency Based Job Descriptions - Skills for Health Levels 2 - 6

This is the first of two documents, which detail the career framework, together with associated competency based job descriptions for roles at Skills for Health Levels 2 to 8, and core competences for level 9 operating within the Integrated Urgent Care/ NHS 111 services, including the Clinical Assessment Services. N.B. Levels 7 to 9 can be found here [here](#).

Utilising the [Calderdale Framework](#), the career framework, competences and job descriptions were developed with provider organisations and further tested within a wider group of provider organisations. This development and Early Adopter process ensures that the career framework and roles are applicable to the delivery of the services and meet the needs of callers/patients.

Using the Framework

The Integrated Urgent Care / NHS 111 Career Framework identifies the key roles for registered and non-registered staff. These are mapped to Skills for Health Levels ranging from Service Advisor at Level 2 to Clinical Director at Level 9.

The key tasks, education and training requirements are listed against each role, as are standardised job descriptions, person specifications and core competences for Skills for Health Levels 2-8 and person specifications and core competences for Skills for health Levels 9, Clinical Director.

The core competences have been sourced from the simplified Knowledge and Skills framework (<http://www.nhsemployers.org/SimplifiedKSF>).

Please note

Providers will be expected to ensure the skills and competencies of their workforce are aligned to those detailed in the Career Framework and implement these products as a key element of the IUC Service Specification.

Acknowledgements

Effective Workforce Solutions (EWS) Ltd were commissioned, utilising the Calderdale Framework, to develop a career framework for the Integrated Urgent Care / NHS 111 workforce, identify roles and standardise competency-based job descriptions for the existing call handling roles, both clinical and non-clinical. They were also asked to identify any new roles and develop standardised competency-based job descriptions for these, including in the emergent Clinical Assessment Services.

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References

Smith & Duffy 2010, Nuffield Trust 2015, Skills for Health Career Framework, National Occupational Standards, KSF simplified version.

This information can be made available in alternative formats, such as easy read or large print, and may be available in alternative languages, upon request. Please contact 0300 311 22 33 or email england.contactus@nhs.net.

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For more information about the Integrated Urgent Care / NHS 111 Workforce Blueprint, click [here](#).



Interactive PDF instructions

This interactive PDF allows you to access information easily, or search for a specific item.

Guide to buttons

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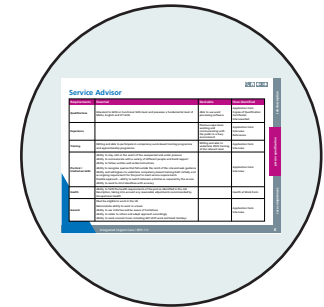
Career Framework



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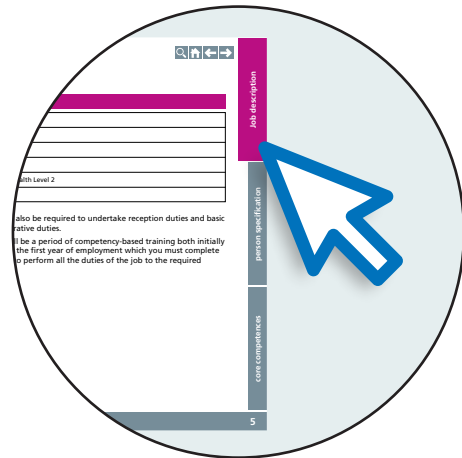
The job description section allows you to customise information, ready to print.



The person specification section is ready to print.



The core competences section is ready to print, complete and keep as a record of performance.



Job description, Person specification and Core competences

Clicking on one of the tabs at the side of the page takes you to the first page of that section.

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Integrated Urgent Care / NHS 111 Career Framework

Skills for Health Levels									
Level 2	Level 3	Level 4		Level 5	Level 6		Level 7	Level 8	Level 9
Service Advisor	Health Advisor	Senior Health Advisor	Team Leader	Clinical Advisor	Senior Clinical Advisor/ Clinical Lead	Urgent Care Practitioner	Advanced Clinical Practitioner	Clinical Consultant	Clinical Director
Key Tasks	Key Tasks	Key Tasks	Key Tasks	Key Tasks	Key Tasks	Key Tasks	Key Tasks	Key Tasks	Key Tasks
Customer service Administration and reception duties Courtesy calls Local signposting	Triage calls Direct patients Use Clinical Decision Support System (CDSS)	Triage calls Provide safe and effective health assessment and advice within protocols Use CDSS	Lead and manage call handling team Provide supervision Performance manage staff Quality assure team's work Use CDSS	Validate calls Provide safe and effective health assessment and advice within protocols Use CDSS	Validate calls Provide clinical leadership Provide clinical support Provide safe and effective clinical assessment and advice within protocols Use CDSS	Provide clinical support Provide safe and effective remote clinical assessment and advice (supported by CDSS) Provide safe and effective face to face clinical assessment, treatment and advice	Remote triage and assessment in NHS 111 call centres Face to face assessment in Clinical Assessment Services Diagnose, treat and/or onward referral – 'Consult and Complete'	Assess, diagnose and treat remotely and face to face Utilise point of care testing Provide clinical leadership and clinical support to other clinical team members Lead on and implement evidence-based service developments Provide expert clinical input into educational programmes	Devise strategies and plans for the clinical department according to organisation standards Assume responsibility for budgeting and resourcing Plan and oversee all patient care or administrative operations and programmes
Education and Training	Education and Training	Education and Training	Education and Training	Education and Training	Education and Training	Education and Training	Education and Training	Education and Training	Education and Training
Apprenticeship In-house systems	Apprenticeship Clinical Decision Support System	Apprenticeship Health and social care training Home management advice training TOXBASE training Dental health training (non-injury) Mental health training Clinical Decision Support System	Apprenticeship Leadership training Coaching training Mentoring training Support skills training	Registered healthcare professional Mental health training Dental health training Clinical Decision Support System	Registered health care professional Leadership training Coaching training Mentoring training	Registered health care professional Masters module in advanced clinical assessment and management	Master's Level apprenticeship Advanced clinical practice Independent prescriber or access to PGD	Registered practitioner Master's Level education Leadership training Expert clinical practice Independent prescriber or access to PGD Working towards professional doctorate or PhD or equivalent	Registered practitioner Master's Level education Working towards professional doctorate or PhD or equivalent (to include advanced leadership)

[Click here for further information on Apprenticeships and Workforce Development](#)

Service Advisor

Job description	
Post title:	Service Advisor
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 2
Location:	

1. The Post

1.1 Post Description

Service Advisors (level 2) require basic factual knowledge of a field of work. They may carry out technical or administrative duties according to established, agreed protocols or procedures, or systems of work. They are able to solve routine problems and make straightforward judgements. They have general skills and work under close supervision (www.skillsforhealth.org.uk).

You will be part of a team based at

You will handle selected calls from patients and healthcare professionals, updating systems as appropriate and following standard operating procedures to respond to callers' questions. (Note that, although service advisors may make system updates as part of the call handling, they do not triage patients.) Computer systems are used to capture patient information.

You may also be required to undertake reception duties and basic administrative duties.

There will be a period of competency-based training both initially and over the first year of employment which you must complete in order to perform all the duties of the job to the required standard.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.ukstandards.org.uk), which can be used as evidence towards educational awards.

2.1 Call Handling

- **Interact with individuals using telecommunications (GEN21.2012).** Answer specified telephone calls within the defined timeframe, and manage these calls in a controlled and professional manner. Record information in the supplied software in an accurate and timely fashion. Call back selected patients, logging non-worsening symptoms and escalating if symptoms are worsening.
- **Communicate effectively in a healthcare environment (GEN97)** with colleagues as well as with callers/patients. Deal with callers with empathy, respect and consideration. Deal with difficult callers in a calm and professional manner.
- **Direct requests for assistance, care or treatment using protocols or guidelines (GEN59)** by signposting selected callers to the most appropriate care/service using the Directory of Services where appropriate, or following local protocols and procedures. Support the achievement of quality standards and performance measures. The calls may relate to the following:
 - Courtesy calls/calls back
 - Repeat medication (prescription) – asymptomatic callers
 - Dental calls (provision of service information and/or transfer to appropriate service or person)
 - Health information (non-symptomatic caller)
 - Location of services
 - Healthcare provider calls

- **Support the safeguarding of individuals (SCDHSC0024)** following local protocols and standards. Escalate a call or seek advice about a call from colleagues if concerned. Relate to others in ways that support rights, inclusion and the wellbeing of individuals, supporting individuals to keep themselves safe.
- **Contribute to the effectiveness of teams (SCDHSC0241).** Work as part of a multi-disciplinary team, actively contributing to service improvements where appropriate. Make sure your whereabouts are known during working hours and participate in duties as designated by the Call Centre supervisor or manager during peak times.

2.2 General Duties

- **Use Office Equipment (CFABAA231).** Undertake administrative tasks (such as word processing, photocopying, filing) as directed by your manager, ensuring this is done accurately and safely.
- **Act within the limits of your competence and authority (GEN63)** i.e. work to local protocols and procedures at all times, escalate calls and queries appropriately and seek assistance when unsure. Participate in regular supervision in line with local guidelines in order to continually improve your performance and gain support following difficult calls.
- **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. Adhere to health and safety policies and report incidents and risks identified through Datix or via line manager.
- **Comply with legal requirements for maintaining confidentiality (CHS169)** by maintaining strict confidentiality to all issues concerned with the service and adhering to requirements of the Data Protection Act 1984, information governance and Caldicott Principles.

- **Foster peoples equality, diversity and rights (SS01)** by being proactive against discrimination.

2.3 Managing Self

- **Develop your own knowledge and practice (SCDHSC0023)**, which includes reflecting on your practice, undertaking supervision and taking opportunities to improve your practice and apply learning in the workplace.
- **Ensure personal fitness for work (GEN1)**, presenting a positive image of yourself and your organisation. Maintain professional conduct, including appearance, at all times.

3. Probationary periods

All staff new to the organisation are required to undertake Clinical Decision Support System training (CDSS). Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Service Advisor

Requirements	Essential	Desirable	How identified
Qualifications	Educated to GCSE or Functional Skills level and possesses a fundamental level of Maths, English and ICT skills	Able to use word processing software	Application Form Copies of Qualification Certificates Interview/test
Experience		Previous experience working and communicating with the public in a busy environment	Application Form Interview References
Training	Willing and able to participate in competency work-based training programme and apprenticeship programme	Willing and able to undertake CDSS training at the relevant level	Application Form Interview
Practical / intellectual skills	Ability to stay calm in the event of the unexpected and under pressure Ability to communicate with a variety of different people and build rapport Ability to follow written and verbal instructions Ability to recognise queries that fall outside the remit of the role and seek guidance Ability and willingness to undertake competency-based training both initially and as ongoing requirement for the post to meet service requirements Flexible approach – ability to switch between activities as required by the service Ability to work to strict deadlines with accuracy		Application Form Interview
Health	Ability to fulfil the health requirements of the post as identified in the Job Description, taking into account any reasonable adjustments recommended by Occupational Health		Health at Work Form
General	Must be eligible to work in the UK Demonstrate ability to work in a team Ability to use initiative and be aware of limitations Ability to relate to others and adapt approach accordingly Ability to work unsocial hours including 24/7 shift work and bank holidays		Application Form Interview

job description

person specification

core competences

Service Advisor

1. Communication	Date achieved	Assessor signature
Level 1 - Communicate with a limited range of people on day-to-day matters. For example: <ul style="list-style-type: none"> Actively listens and asks questions to understand needs Shares and disseminates information ensuring confidentiality where required Checks information for accuracy Presents a positive image of self and the service Keeps relevant people informed of progress Keeps relevant and up-to-date records of communication 		
Level 2 - Communicate with a range of people on a range of matters <ul style="list-style-type: none"> Uses a range of communication channels to build relationships in the workplace Adjusts rate and pitch of speech to meet callers' needs Manages people's expectations Manages barriers to effective communication by adjusting the way you communicate over the telephone, ensuring that you clarify callers' responses, explain the resulting disposition and give standard response on worsening symptoms, in line with local guidance and protocols 		

Comments and Action Plan

Service Advisor

2. Personal and People Development	Date achieved	Assessor signature
Level 1 - Contribute to own personal development. For example:		
<ul style="list-style-type: none"> Identifies whether own skills and knowledge are in place to do own job 		
<ul style="list-style-type: none"> Prepares for and takes part in own appraisal 		
<ul style="list-style-type: none"> Identifies (with support if necessary) what development gaps exist and how they may be filled 		
<ul style="list-style-type: none"> Produces, with appraiser, a personal development plan 		
<ul style="list-style-type: none"> Takes an active part in learning/development activities and keeps a record of them 		

Comments and Action Plan

job description

person specification

core competences

Service Advisor

3. Health, Safety and Security	Date achieved	Assessor signature
<p>Level 1 - Assist in maintaining own and others' health, safety and security. For example:</p>		
<ul style="list-style-type: none"> • Follows organisational policies, procedures and risk assessments to keep self and others safe at work 		
<ul style="list-style-type: none"> • Helps keep a healthy, safe and secure workplace for everyone 		
<ul style="list-style-type: none"> • Works in a way that reduces risks to health, safety and security – eg. ensures workspace is cleaned and headset disinfected regularly 		
<ul style="list-style-type: none"> • Presents a positive image of self and the service knows what to do in an emergency at work, knows how to get help and acts immediately to get help 		
<ul style="list-style-type: none"> • Reports any issues at work that may put self or others at a health, safety or security risk 		

Comments and Action Plan

Service Advisor

4. Service Improvement	Date achieved	Assessor signature
<p>Level 1 - Make changes in own practice and offer suggestions for improving services. For example:</p>		
<ul style="list-style-type: none"> • Discusses with line manager changes that might need making to own work practice and why 		
<ul style="list-style-type: none"> • Adapts own work and takes on new tasks as agreed and asks for help if needed 		
<ul style="list-style-type: none"> • Helps evaluate the service when asked to do so 		
<ul style="list-style-type: none"> • Passes on any good ideas to improve services to line manager or appropriate person 		
<ul style="list-style-type: none"> • Alerts manager if new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		

Comments and Action Plan

job description

person specification

core competences

Service Advisor

5. Quality	Date achieved	Assessor signature
<p>Level 1 - Maintain the quality of own work. For example:</p>		
<ul style="list-style-type: none"> • Works as required by the organisation and professional policies and procedures 		
<ul style="list-style-type: none"> • Works within the limits of own competence and area of responsibility and refers any issues that arise beyond these limits to the relevant people 		
<ul style="list-style-type: none"> • Works closely with own team and asks for help if necessary 		
<ul style="list-style-type: none"> • Reports any problems, issues or errors made with work immediately to line manager and helps to solve or rectify the situation 		

Comments and Action Plan

Service Advisor

6. Equality and Diversity	Date achieved	Assessor signature
<p>Level 1 - Communicate with a limited range of people on day-to-day matters. For example:</p>		
<ul style="list-style-type: none"> • Acts in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Treats everyone with dignity and respect, allows others to express their views even when different from one's own 		
<ul style="list-style-type: none"> • Does not discriminate or offer a poor service because of others' differences or different viewpoints 		

Comments and Action Plan

1. Interact with Individuals Using Telecommunications (GEN21.2012)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3380/>

Performance criteria	Date achieved	Assessor signature
1. Respond to individuals according to organisational policies		
2. Identify any constraints on individuals and the circumstances in which the interaction is being made		
3. Provide information about the service and confirm its appropriateness to the individual		
4. Assess whether there is any risk or danger facing the individual, and take appropriate action to deal with it		
5. Encourage individuals to share their concerns and to focus on their requirements		
6. Provide suitable opportunities for individuals to sustain the interaction		
7. Encourage individuals to provide additional information on their situation or requirements		
8. Respond to individuals' immediate requirements at each stage during the interaction		
9. Provide suitable indications to reassure individuals of continued interest		
10. Identify any signs of increased stress during interactions and establish their significance		
11. Provide clear information on the requirement to end the interaction		
12. End interactions according to the guidelines and procedures of your organisation		
13. Identify situations where it would be dangerous or disadvantageous to the interest of the individual to terminate the interaction		
14. Take the appropriate action to resolve dangerous situations		
15. Ensure you have recorded and checked the individual's demographic details where this is required before ending/transferring the interaction		
16. Where you are providing a confidential service, ensure the anonymity of individuals, self, and colleagues is maintained according to the procedures of the service		
17. Record details of interactions in the appropriate systems		

Comments and Action Plan

2. Communicate Effectively in a Healthcare Environment (GEN97)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3001/>

Performance criteria	Date achieved	Assessor signature
1. Acknowledge and respond to communication promptly		
2. Select the most appropriate method of communication for the individuals		
3. Ensure that the environment for communication is as conducive as possible to effective communication		
4. Adapt your communication style to suit the situation		
5. Identify any communication barriers with the individuals and take the appropriate action		
6. Actively listen and respond appropriately to any questions and concerns raised during communications		
7. Establish lines of communication that enable you to communicate with individuals in other locations in times of need or emergency		
8. Communicate clearly and coherently taking into account the needs of individuals		
9. Clarify points and check that you and others understand what is being communicated		
10. Maintain confidentiality of information where appropriate to do so		

Comments and Action Plan

3. Direct Requests for Assistance, Care or Treatment Using Protocols or Guidelines (GEN59)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/412/>

Performance criteria	Date achieved	Assessor signature
1. Explain to the individual what your role is and the process you will go through in order to direct their request		
2. Clarify and confirm that the individual understands and accepts the actions being taken to direct their request		
3. Select and apply the correct guidelines appropriate to the individual, and the context and circumstances in which the request is being made		
4. Adhere to the sequence of questions within the protocols and guidelines		
5. Phrase questions in line with the requirements of the protocols and guidelines, adjusting your phrasing within permitted limits to enable the individual to understand and answer you better		
6. Accurately and appropriately record responses and other information obtained of relevance during immediate interaction, treatment or care of the individual		
7. Determine which service or assistance the individual requires (from The Directory of Services) and refer them on		
8. Seek prompt advice when a clear referral cannot be made or when an alternative service is not known		
9. Pass on all information obtained to the organisation who will be receiving the individual, as necessary and in line with patient confidentiality and data protection requirements		
10. Inform the individual making the request what course of action you are taking and what will happen next		
11. Explain clearly the time frame within which the individual making the request can expect to be given further assistance, giving them interim guidance, support and reassurance where appropriate		
12. Recognise when a request is beyond your remit or your organisation's remit, and inform the individual of more appropriate alternative services, where known		

Comments and Action Plan

4. Support the Safeguarding of Individuals (SCDHGSC0024)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
i) Support practices that help to safeguard individuals from harm or abuse		
1. Respond to individuals according to organisational policies. Recognise actions, behaviours and situations that may lead to harm or abuse		
2. Recognise signs from verbal communication that may indicate an individual has been, or is in danger of being, harmed or abused		
3. Report, in accordance with work setting requirements, any changes, events or occurrences that cause you concern about the welfare of an individual		
4. Seek support in situations beyond your experience or expertise		
5. Use supervision and support to deal with your own reactions to possible harm or abuse, within confidentiality requirements		
ii) Work in ways that support the rights, inclusion and wellbeing of individuals		
1. Ask the individual about their preferences		
2. Ensure your own actions support the individual in person centred ways		
3. Ensure your own actions respect the individual's dignity, privacy, beliefs, preferences, culture, values and rights		
4. Ensure your own actions support the individual's self-esteem, sense of security and belonging		
5. Ensure your own actions support the individual's active participation, independence and responsibility		
6. Ensure your own actions support equity and inclusion and do not discriminate		
7. Take appropriate steps where the behaviour and actions of others do not support the rights, inclusion and wellbeing of the individual (i.e. refer to line manager)		

Comments and Action Plan

5. Contribute to the Effectiveness of Teams (SCDHSC0241)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
Participate effectively as a team member		
1. Carry out your agreed role and responsibilities within the team		
2. Inform other members of the team about your activities		
3. Ensure your behaviour towards other team members helps the team to function effectively		
4. Complete your commitments to other team members effectively and according to overall work priorities		
5. Where you cannot complete any commitments within timescales specified, immediately inform appropriate team members		
6. Respond to differences of opinion constructively and in ways which respect other team members' points of view		
7. Where you experience problems in working effectively with other team members, seek appropriate advice and guidance		

Comments and Action Plan

6. Use of Office Equipment (CFABAA231)

https://tools.skillsforhealth.org.uk/external/CFA_BAA231.pdf

Performance criteria	Date achieved	Assessor signature
1. Locate and select the equipment and resources needed for the task		
2. Follow manufacturer's, organisational operating instructions and health and safety requirements for different equipment		
3. Waste as few resources as possible		
4. Keep equipment clean and hygienic		
5. Deal with equipment and resource problems according to manufacturer's and organisational procedures		
6. Report problems that cannot be dealt with personally to the appropriate colleague		
7. Make sure final work product meets agreed requirements		
8. Produce the work product within agreed timescales		
9. Make sure the equipment, resources and work area are ready for the next user		

Comments and Action Plan

8. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
i) Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
ii) Reduce the risks to health and safety at work:		
1. Control those health and safety risks within your capability and job responsibilities		
2. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
3. Pass on suggestions for reducing risks to health and safety to the responsible people		
4. Make sure your behaviour does not endanger the health and safety of you or others at work, e.g. ensure your workspace and headset are cleaned regularly		
5. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
6. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
7. Make sure that your personal presentation and behaviour at work protects the health and safety of you and others, meets any legal responsibilities, and is in accordance with workplace instructions		

Comments and Action Plan

9. Comply with Legal Requirements for Maintaining Confidentiality (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individual's needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local policies and protocols		

Comments and Action Plan

10. Foster people’s equality, diversity and rights (SS01)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2128/>

Performance criteria	Date achieved	Assessor signature
1. Recognise people’s right to make their own decisions and acknowledge their responsibilities		
2. Ensure that your actions in interpreting the meaning of rights and responsibilities are consistent with existing legislative frameworks and organisational policy		
3. Provide information which is up-to-date and takes account of the complexity of the decisions which people may need to make		
4. Give appropriate help to people who are unable to exercise their rights personally		
5. Acknowledge tensions between rights and responsibilities and provide appropriate support towards their resolution		
6. Ensure the necessary records relating to the promotion of rights and responsibilities are accurate, legible and complete		
7. Provide the necessary information to people who wish to make a complaint about an infringement of their rights		
8. Offer appropriate support to any others involved in the incident once any initial danger has passed		
9. Keep records of incidents that are accurate, legible and complete		
10. Ensure your actions are consistent with people’s expressed beliefs and views and acknowledge the benefits of diversity		
11. Promote anti-discriminatory practice in ways which are consistent with legislative frameworks and organisational policy		
12. Take appropriate action to minimise the impact of discrimination and oppression on people		
13. Seek advice and guidance when you have difficulty promoting equality and diversity		
14. Record information which is consistent with the promotion of equality and diversity		
15. Ensure that information stored in, and retrieved from, recording systems is consistent with the requirements of legislation and organisational policy		
16. Maintain records which are accurate and legible and contain only the information necessary for the record’s purpose		
17. Disclose information only to those who have the right and need to know once proof of identity has been obtained		
18. Take appropriate precautions when communicating confidential or sensitive information to those who have the right and need to know it		

10. Foster people’s equality, diversity and rights (SS01) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2128/>

Performance criteria	Date achieved	Assessor signature
19. Inform people in a clear and appropriate manner that information will be shared with others when they tell you something that you are required to share with others		
20. Handle confidential records securely and store them in the correct place		

Comments and Action Plan

11. Develop Your Own Knowledge and Practice (SCDHSC0023)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Performance criteria	Date achieved	Assessor signature
i) Reflect on your current practice		
1. Clarify with others (e.g. line manager, mentor/clinical supervisor) the skills, knowledge and values required to carry out your job role		
2. Clarify with others the areas of your work where literacy, numeracy and information technology skills are necessary – using supervision and teaching sessions		
3. Actively seek feedback from your line manager, mentor and/or supervisor on your use of skills, knowledge and values in your practice		
4. Agree with others the areas of strength in your practice		
5. Reflect with others on the way your values, personal beliefs and experiences may affect your work with individuals		
ii) Plan to develop your knowledge and practice		
1. Seek support from others to identify areas for development within your practice that would help you to carry out your work activities more effectively		
2. Seek advice on development opportunities to achieve development from your line manager, mentor or clinical supervisor		
3. Agree a personal development plan with your line manager and/or supervisor		
4. Secure opportunities for development with the help of your line manager or mentor		
iii) Apply acquired knowledge and skills in your work		
1. Use opportunities with others to reflect on your learning from development opportunities in order to continuously improve your practice		
2. Review how the newly acquired skills and knowledge can be applied in your practice		
3. Confirm with others that it is safe and within your job role before applying new skills and knowledge		
4. Apply new skills and knowledge that have been agreed as appropriate to your job role		
5. Evaluate with others how far your new skills and knowledge have enhanced your work		

11. Develop Your Own Knowledge and Practice (SCDHSC0023) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Comments and Action Plan

job description

person specification

core competences

12. Ensure Personal Fitness For Work (GEN1)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/372/>

Performance criteria	Date achieved	Assessor signature
1. Make sure that you are fit for work		
2. Report any personal episodes of illness and infection which could compromise your work to the person in charge of your shift		
3. Report any episodes of illness or infection in close social contacts which could compromise your work to the person in charge of your shift		
4. Visit your General Practitioner or Occupational Health Service when situations occur that may compromise work		
5. Keep your manager fully informed of the need to be away from work		
6. Maintain a clean and healthy personal status		
7. Promptly resolve problems of personal hygiene before risk of cross infection can occur		
8. Ensure that all necessary health promotion schemes such as vaccination for work and social activities are taken up as advised by the Occupational Health Department		
9. Comply with national regulations related to viral antigen testing before starting and during employment when involved in exposure prone procedures		

Comments and Action Plan

Health Advisor

Job description	
Post title:	Health Advisor
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 3
Location:	

1. The Post

1.1 Post Description

Health Advisors (level 3) require knowledge of facts, principles, processes and general concepts in a field of work. They may carry out a wider range of duties than the person working at Level 2 and will have more responsibility with guidance and supervision available when needed. They will contribute to service development and are responsible for self-development (www.skillsforhealth.org.uk).

You will be part of a team based at

You will manage calls from patients and healthcare professionals with urgent and non-urgent healthcare needs, using the Clinical Decision Support System appropriately to direct the patient to the service suitable for their needs.

You will use computer systems to capture patient information. You will be expected to demonstrate self directed learning and practice.

There will be a period of competency-based training both initially and over the first year of employment which you must complete in order to perform all the duties of the job to the required standard.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.ukstandards.org.uk), which can be used as evidence towards educational awards.

2.1 Call Handling

- **Receive requests for assistance, treatment or care (GEN58)** to IUC / NHS 111 call centre. The requests may be from members of the public, healthcare practitioners or other professionals.
- **Interact with Individuals using telecommunications (GEN21.2012)**. You will answer the calls in an efficient and courteous manner using organisational standards and protocols. This will involve triaging patient calls using the appropriate Clinical Decision Support System (CDSS).
- **Communicate effectively in a healthcare environment (GEN97)** with colleagues as well as callers to the IUC / NHS 111 service. You will need to adjust the way you communicate to fit their knowledge and deal with callers with empathy and understanding. You will accurately record and check or amend details on the call logging computer system.
- **Direct requests for assistance, care or treatment using protocols or guidelines (GEN 59)** by signposting patients/ callers to the most appropriate care/service using the Directory of Services where appropriate, guided by CDSS. This includes making judgements around what may or may not be significant changes in a patient's condition. This may involve recognition and appropriate response to emergency situations.

- **Support the safeguarding of individuals (SCDHSC0024)** following local protocols and standards. Relate to others in ways which support rights, inclusion and wellbeing of individuals, supporting individuals to keep themselves safe.
- **Contribute to the effectiveness of teams (SCDHSC0241)**. Work as part of a multidisciplinary team, actively contributing to service improvements where appropriate. Assist new members of staff. Assist in general administrative and clerical duties. Provide cover for sickness, bank holidays, annual leave of other health advisors. Work flexibly across sites as required by the service.

2.2 General Duties

- **Act within the limits of your competence and authority (GEN63)**, i.e. work to CDSS competencies and adhere to local protocols and procedures.
- **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. Adhere to health and safety policies and report incidents and risks identified through Datix or via line manager.
- **Comply with legal requirements for maintaining confidentiality (CHS169)** by maintaining strict confidentiality of all issues concerned with the service. Adhere to requirements of the Data Protection Act 1984, information governance and Caldicott Principles.
- **Foster peoples equality, diversity and rights (SS01)** by being proactive against discrimination.

2.3 Managing Self

- **Make use of supervision (GEN36).** Participate in regular supervision in line with local guidelines in order to continually improve your performance and gain support following difficult calls.
- **Develop your own knowledge and practice (SCDHSC0023),** which includes reflecting on your practice, and taking opportunities to improve your practice and apply learning in the workplace.
- **Ensure personal fitness for work (GEN1)** presenting a positive image of self and the organisation. Maintain professional conduct including appearance at all times.
- **Developing Others**
NB there is scope to add a CDSS coaching function to this role once the health advisor has gained experience in their role and is keen to support development of others. The additional competences would be.
- **Undertake coaching or mentoring (LSICM05)** with new health advisors to support them in the IUC / NHS 111 call centre and their use of CDSS. This would require additional training to gain accreditation as an NHS Pathway coach or other CDSS equivalent.

3. Probationary periods

All staff new to the organisation are required to undertake CDSS training. Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Health Advisor

Requirements	Essential	Desirable	How identified
Qualifications	Educated to GCSE or Functional Skills level and possesses a fundamental level of Maths, English and ICT skills	Minimum GCSE level English and Maths or equivalent Typing/word processing skills or qualification	Application Form Copies of Qualification Certificates Interview/test
Experience	Previous experience working and communicating with the public	Computer experience Previous experience working in a team or with stakeholders across a range of settings	Application Form Interview References
Training	Willing and able to participate in competency work-based training and apprenticeship programme Commitment to Continuous Professional Development (CPD) and lifelong learning	Knowledge of the client group and evidence of related training Previous competency-based training in relevant field	Application Form Interview
Practical / intellectual skills	Ability to use own initiative as appropriate Ability to stay calm in the event of the unexpected and under pressure Ability to communicate with a variety of different people and build rapport Ability to follow written and verbal instructions Ability and willingness to undertake competency-based training both initially and as ongoing requirement for the post to meet service requirements		Application Form Interview
Health	Ability to fulfil the health requirements of the post as identified in the Job Description, taking into account any reasonable adjustments recommended by Occupational Health		Health at Work Form
General	Must be eligible to work in the UK Demonstrate ability to work in a team Ability to use initiative and be aware of limitations Ability to deal sensitively with distressing, emotional situations Ability to relate to others and adapt approach accordingly. Ability to work unsocial hours including 24/7 shift work and bank holidays		Application Form Interview

Health Advisor

1. Communication	Date achieved	Assessor signature
Level 2 - Communicate with a range of people on a range of matters. For example:		
<ul style="list-style-type: none"> • Uses a range of communication channels to build relationships in the workplace 		
<ul style="list-style-type: none"> • Adjusts rate and pitch of speech to meet callers' needs 		
<ul style="list-style-type: none"> • Manages people's expectations 		
<ul style="list-style-type: none"> • Manages barriers to effective communication by adjusting the way you communicate over the telephone, ensuring that you clarify callers' responses, explain the resulting disposition and give standard advice on worsening symptoms 		
Level 3 - Develop and maintain communication with people about difficult matters and/or in difficult situations:		
<ul style="list-style-type: none"> • Identifies the impact of contextual factors on communication 		
<ul style="list-style-type: none"> • Adjusts communication to take account of others' culture, background, knowledge and preferred way of communicating 		
<ul style="list-style-type: none"> • Provides feedback to others on their communication where appropriate 		
<ul style="list-style-type: none"> • Shares and engages thinking with others 		
<ul style="list-style-type: none"> • Maintains the highest standards of integrity when communicating with patients and the wider public 		

Comments and Action Plan

Health Advisor

2. Personal and People Development	Date achieved	Assessor signature
Level 2 - Develop own skills and knowledge and provide information to others to help their development. For example:		
<ul style="list-style-type: none"> Seeks feedback from others about work to help identify own development needs 		
<ul style="list-style-type: none"> Evaluates effectiveness of own learning/development opportunities and relates this to others 		
<ul style="list-style-type: none"> Identifies development needs for own emerging work demands and future career aspiration 		
<ul style="list-style-type: none"> Offers help and guidance to others to support their development or to help them complete their work requirements effectively 		
<ul style="list-style-type: none"> Offers feedback promptly 		
Level 3 – Develop oneself and contribute to the development of others:		
<ul style="list-style-type: none"> Assesses how well last year’s objectives were met and helps to set this year’s objectives 		
<ul style="list-style-type: none"> Takes responsibility for meeting own development needs 		
<ul style="list-style-type: none"> Identifies development needs for others’ emerging work demands and future career aspirations 		
<ul style="list-style-type: none"> Enables opportunities for others to apply their developing knowledge and skills 		
<ul style="list-style-type: none"> Actively provides learning and development opportunities to others 		
<ul style="list-style-type: none"> Actively contributes to the evaluation of the effectiveness of others’ learning/development opportunities and relates this to others 		
Comments and Action Plan		

Health Advisor

3. Health, Safety and Security	Date achieved	Assessor signature
<p>Level 1 - Assist in maintaining own and others' health, safety and security. For example:</p>		
<ul style="list-style-type: none"> Follows organisational policies, procedures and risk assessments to keep self and others safe at work 		
<ul style="list-style-type: none"> Helps keep a healthy, safe and secure workplace for everyone 		
<ul style="list-style-type: none"> Works in a way that reduces risks to health, safety and security – e.g. ensures workspace is cleaned and headset disinfected regularly 		
<ul style="list-style-type: none"> Presents a positive image of self and the service, knows what to do in an emergency at work, knows how to get help and acts immediately to get help 		
<ul style="list-style-type: none"> Reports any issues at work that may put self or others at a health, safety or security risk 		

Comments and Action Plan

Health Advisor

4. Service Improvement	Date achieved	Assessor signature
Level 1 - Make changes in own practice and offer suggestions for improving services. For example:		
<ul style="list-style-type: none"> • Discusses with line manager changes that might need making to own work practice and why 		
<ul style="list-style-type: none"> • Adapts own work and takes on new tasks as agreed and asks for help if needed 		
<ul style="list-style-type: none"> • Helps evaluate the service when asked to do so 		
<ul style="list-style-type: none"> • Passes on any good ideas to improve services to line manager or appropriate person 		
<ul style="list-style-type: none"> • Alerts manager if new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		
Level 2 - Contribute to the improvement of services:		
<ul style="list-style-type: none"> • Discusses with team the likely impact of changing policies, strategies and procedures on practice. Also, about changes the team can make and how to make them effective 		
<ul style="list-style-type: none"> • Takes on new work and make changes to own work when agreed, requesting relevant help if needed 		
<ul style="list-style-type: none"> • Supports colleagues in understanding and making agreed changes to their work 		
<ul style="list-style-type: none"> • Evaluates own and others' work when needed 		
<ul style="list-style-type: none"> • Makes suggestions to improve the service 		
<ul style="list-style-type: none"> • Constructively identifies where new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		

Comments and Action Plan

Health Advisor

5. Quality	Date achieved	Assessor signature
<p>Level 1 - Maintain the quality of own work. For example:</p>		
<ul style="list-style-type: none"> • Works as required by the organisation and professional policies and procedures 		
<ul style="list-style-type: none"> • Works within the limits of own competence and area of responsibility and refers any issues that arise beyond these limits to the relevant people 		
<ul style="list-style-type: none"> • Works closely with own team and asks for help if necessary 		
<ul style="list-style-type: none"> • Reports any problems, issues or errors made with work immediately to line manager and helps to solve or rectify the situation 		
<p>Level 2 - maintain quality in own work and encourage others to do so:</p>		
<ul style="list-style-type: none"> • Follows organisational and professional policies and procedures and other quality approaches as required. Encourages others to do the same. Maintains professional registration if has one 		
<ul style="list-style-type: none"> • Works within the limits of own competence and area of responsibility and accountability. Gets help and advice where needed 		
<ul style="list-style-type: none"> • Works to support the team. Can be counted on when people ask for help or support (e.g. work flexibly to cover rotas) 		
<ul style="list-style-type: none"> • Prioritises own workload and manages own time to ensure calls are answered within quality target time 		

Comments and Action Plan

Health Advisor

6. Equality and Diversity	Date achieved	Assessor signature
Level 1 - Communicate with a limited range of people on day-to-day matters. For example:		
<ul style="list-style-type: none"> • Acts in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Treats everyone with dignity and respect, allows others to express their views even when different from one's own 		
<ul style="list-style-type: none"> • Does not discriminate or offer a poor service because of others' differences or different viewpoints 		
Level 2 - Support equality and value diversity		
<ul style="list-style-type: none"> • Challenges bias, prejudice and intolerance if appropriate or brings it to the attention of a manager 		
<ul style="list-style-type: none"> • Uses plain language when carrying out duties 		
<ul style="list-style-type: none"> • Aware of the impact of own behaviour on others 		

Comments and Action Plan

1. Receive Requests for Assistance, Treatment or Care (GEN58)

<http://www.ukstandards.org.uk/PublishedNos/SFHGEN58.pdf>

Performance criteria	Date achieved	Assessor signature
1. Be able to explain clearly and calmly to the caller your own role and its scope		
2. Request clearly (explain if needed): <ul style="list-style-type: none"> • what information you need • the reasons why you need the information and why some questions are needed at the start of the call • with whom the information will be shared 		
3. Communicate with the individual in a sensitive and respectful manner which promotes confidence, reduces anxiety and maintains their privacy and dignity		
4. Communicate with the individual in a manner consistent with: <ul style="list-style-type: none"> • their level of understanding • their culture and background – use a translator if needed • their preferred ways of communicating • their need for reassurance and support • the circumstances in which they are making the request 		
5. Confirm the personal and contact details of the individual who requires assistance, treatment or care and, where appropriate, those for the person making the request on behalf of the individual		
6. Use the CDSS triage system to obtain the presenting history, symptoms and other relevant information as fully, accurately and sequentially as the circumstances of the request permit		
7. Ensure that you have obtained the information required so that the individual receives appropriate advice, further assistance and treatment or care using CDSS. Escalate as per local protocols and CDSS if indicated		
8. Take appropriate action based upon all information received and the disposition arrived at via CDSS		
9. Record, store and share, if appropriate, the information received, in line with patient confidentiality, data protection and other relevant legislation, protocols and guidelines		
10. Adhere to legislation, protocols and guidelines when giving advice to individuals		
11. Recognise when a request is outside your remit and advise the individual of an alternative service		
12. Recognise, using a CDSS, when a request requires a direct referral on behalf of the patient or caller		
13. Recognise the boundary of your role and responsibility and the situations that are beyond your competence and authority and escalate to a more senior member of staff		

1. Receive Requests for Assistance, Treatment or Care (GEN58) *continued*

<http://www.ukstandards.org.uk/PublishedNos/SFHGEN58.pdf>

Comments and Action Plan

2. Interact with Individuals using Telecommunication (GEN21.2012)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3380/>

Performance criteria	Date achieved	Assessor signature
1. Respond to individuals according to organisational policies, answering the call within agreed standards		
2. Identify any constraints on individuals and the circumstances in which the interaction is being made. Ensure the caller is with the patient		
3. Ensure you have recorded and checked the individual's demographic details at the start of the call		
4. Encourage individuals to identify symptoms and to focus on their requirements using CDSS and local protocols, and take appropriate action to deal with it. Assess whether there is any risk or dangers facing the individual		
5. Provide suitable opportunities for individuals to sustain the interaction		
6. Encourage individuals to provide additional information on their situation or requirements		
7. Respond to individuals' immediate requirements at each stage during the interaction, guided by CDSS		
8. Provide suitable indications to reassure individuals of continued interest		
9. Identify any signs of increased stress during interactions and establish their significance		
10. Provide clear information on the requirement to end the interaction		
11. End interactions according to the guidelines and procedures of your organisation, ensuring standard information on what to do if symptoms worsen is given		
12. Identify situations where it would be dangerous or disadvantageous to the interest of the individual to terminate the interaction and follow local protocols to manage this		
13. Follow local protocols and CDSS to take the appropriate action to resolve dangerous situations		
14. Where you are providing a confidential service, ensure the anonymity of individuals, self, and colleagues is maintained according to the procedures of the service		
15. Record details of interactions in the appropriate systems		

Comments and Action Plan

3. Communicate Effectively in a Healthcare Environment (GEN97)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3001/>

Performance criteria	Date achieved	Assessor signature
1. Acknowledge and respond to communication promptly		
2. Communicate clearly and coherently taking into account the needs of individuals		
3. Select the most appropriate method of communication for the individuals		
4. Ensure that the environment for communication is as conducive as possible for effective communication		
5. Adapt your communication style to suit the situation		
6. Identify any communication barriers with the individuals and take the appropriate action		
7. Clarify points and check that you and others understand what is being communicated		
8. Actively listen and respond appropriately to any questions and concerns raised during communications		
9. Establish lines of communication which enable you to communicate with individuals in other locations in times of need or emergency		
10. Maintain confidentiality of information where appropriate to do so		

Comments and Action Plan

4. Direct Requests for Assistance, Care or Treatment using Protocols/Guidelines (GEN59)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/412/>

Performance criteria	Date achieved	Assessor signature
1. Introduce yourself and explain the process you will go through in order to direct their request i.e. the need to ask questions to clarify (follow local protocols)		
2. Clarify and confirm that the caller is with the patient and accepts the actions being taken to direct their request		
3. Select and apply the correct protocols and guidelines appropriate to the individual, and the context and circumstances in which the request is being made		
4. Adhere to the sequence of questions within the protocols and guidelines		
5. Phrase questions in line with the requirements of the protocols and guidelines, adjusting your phrasing within permitted limits to enable the individual to understand and answer you better		
6. Accurately and appropriately record responses and other information obtained of relevance during immediate interaction, treatment or care of the individual		
7. Using CDSS determine which service or assistance the individual requires and using Directory of Services signpost as appropriate or refer directly if indicated		
8. Seek prompt advice and/or early exit the call when indicated by CDSS or when a clear referral cannot be made or when an alternative service is not known, or if the caller declines the disposition		
9. Pass on all information obtained to the organisation who will be receiving the individual, as necessary and in line with patient confidentiality and data protection requirements		
10. Inform the caller what course of action you are taking (the disposition) and what will happen next		
11. Explain clearly the time frame within which the caller can expect to be given further assistance, giving them interim guidance as per CDSS, and guidance on calling back if symptoms worsen		
12. Recognise when a request is beyond your remit and transfer the call to the appropriate colleague or service		
13. Recognise when a request is outside the remit of your service and advise the caller of more appropriate services if known		

4. Direct Requests for Assistance, Care or Treatment using Protocols/Guidelines (GEN59) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/412/>

Comments and Action Plan

job description

person specification

core competences

5. Support the Safeguarding of Individuals (SCDHSC0024)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
i) Maintain your understanding and awareness of harm, abuse and safeguarding:		
1. Demonstrate understanding of factors, situations and actions that may cause or lead to harm and abuse		
2. Demonstrate understanding of signs and symptoms picked up in a telephone triage that may indicate that an individual has been, or is in danger of being, harmed or abused		
3. Demonstrate understanding of local procedures and your own accountability where there are concerns that an individual has been, or is in danger of being, harmed or abused		
4. Demonstrate understanding of the role of different agencies and the need for multi-agency working in safeguarding		
5. Demonstrate understanding of the actions you need to take when harm or abuse is suspected or has been disclosed, in line with local procedures and the responsibilities and boundaries of your role		
6. Demonstrate understanding of actions you must take and those you must avoid in order to protect the integrity of telephone evidence relating to possible harm or abuse		
7. Reflect on your own behaviour and values to ensure that they do not contribute to situations, actions or behaviour that may be harmful or abusive		
ii) Support practices that help to safeguard individuals from harm or abuse:		
1. Respond to individuals according to organisational policies. Recognise actions, behaviours and situations that may lead to harm or abuse		
2. Recognise signs from verbal communication that may indicate an individual has been, or is in danger of being, harmed or abused		
3. Report, in accordance with work setting requirements, any changes, events or occurrences that cause you concern about the welfare of an individual		
4. Seek support in situations beyond your experience or expertise		
5. Use supervision and support to deal with your own reactions to possible harm or abuse, within confidentiality requirements		

5. Support the Safeguarding of Individuals (SCDHSC0024) *continued*

Performance criteria	Date achieved	Assessor signature
iii) Work in ways that support the rights, inclusion and wellbeing of individuals:		
1. Ask the individual about their preferences		
2. Ensure your own actions support the individual in person centred ways		
3. Ensure your own actions respect the individual's dignity, privacy, beliefs, preferences, culture, values and rights		
4. Ensure your own actions support the individual's self-esteem, sense of security and belonging		
5. Ensure your own actions support the individual's active participation, independence and responsibility		
6. Ensure your own actions support equity and inclusion and do not discriminate		
7. Take appropriate steps where the behaviour and actions of others do not support the rights, inclusion and wellbeing of the individual (i.e. refer to line manager)		

Comments and Action Plan

6. Contribute to the Effectiveness of Teams (SCDHSC0241)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
i) Agree your role and responsibilities within the team:		
1. Access information about the team, its objectives and its purpose		
2. Ensure you understand the information about the team, its objectives and its purpose		
3. Work with other team members to ensure you understand your role and responsibilities and how they contribute to the overall objectives and purpose of the team		
4. Work with other team members to understand their roles and responsibilities		
5. Work with other team members to clarify how you can and should contribute to team activities, objectives and purposes		
ii) Participate effectively as a team member:		
1. Carry out your agreed role and responsibilities within the team		
2. Inform other members of the team about your activities		
3. Ensure your behaviour towards other team members helps the team to function effectively		
4. Complete your commitments to other team members effectively and according to overall work priorities		
5. Where you cannot complete any commitments within timescales specified, immediately inform appropriate team members		
6. Respond to differences of opinion constructively and in ways which respect other team members' points of view		
7. Where you experience problems in working effectively with other team members, seek appropriate advice and guidance		

6. Contribute to the Effectiveness of Teams (SCDHSC0241) *continued*

Performance criteria	Date achieved	Assessor signature
iii) Contribute to improving the team's effectiveness:		
1. Offer supportive and constructive assistance to team members		
2. Offer suggestions, ideas and information that will benefit team members and improve team working		
3. Invite feedback from others about how you carry out your role in the team		
4. Use suggestions and information from others (e.g. call audits and quality target information) to improve your practice as a team member		
5. Take responsibility for agreeing and undertaking any development and learning that will enable you to carry out your role and responsibilities within the team more effectively		

Comments and Action Plan

7. Act Within the Limits of Your Competence and Authority (GEN63)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/85/>

Performance criteria	Date achieved	Assessor signature
1. Adhere to legislation, protocols and guidelines relevant to your role and field of practice		
2. Work within organisational systems and requirements as appropriate to your role		
3. Recognise the boundary of your role and responsibility and seek supervision or escalate the call when situations are beyond your competence and authority		
4. Maintain competence within your role and field of practice		
5. Use relevant research based protocols and guidelines as evidence to inform your practice		
6. Promote and demonstrate good practice as an individual and as a team member at all times		
7. Identify and manage potential and actual risks to the quality and safety of practice		

Comments and Action Plan

8. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
i) Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
ii) Reduce the risks to health and safety at work:		
1. Control those health and safety risks within your capability and job responsibilities		
2. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
3. Pass on suggestions for reducing risks to health and safety to the responsible people		
4. Make sure your behaviour does not endanger the health and safety of you or others at work. e.g. ensure your workspace and headset are cleaned regularly		
5. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
6. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
7. Make sure that your personal presentation and behaviour at work: <ul style="list-style-type: none"> • protects the health and safety of you and others • meets any legal responsibilities, and • is in accordance with workplace instructions 		

8. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1) *continued*

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Comments and Action Plan

9. Comply with Legal Requirements for Maintaining Confidentiality (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individual's needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local policies and protocols		

Comments and Action Plan

10. Foster people’s equality, diversity and rights (SS01)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2128/>

Performance criteria	Date achieved	Assessor signature
1. Recognise people’s right to make their own decisions and acknowledge their responsibilities		
2. Ensure that your actions in interpreting the meaning of rights and responsibilities are consistent with existing legislative frameworks and organisational policy		
3. Provide information which is up-to-date and takes account of the complexity of the decisions which people may need to make		
4. Give appropriate help to people who are unable to exercise their rights personally		
5. Acknowledge tensions between rights and responsibilities and provide appropriate support towards their resolution		
6. Ensure the necessary records relating to the promotion of rights and responsibilities are accurate, legible and complete		
7. Provide the necessary information to people who wish to make a complaint about an infringement of their rights		
8. Offer appropriate support to any others involved in the incident once any initial danger has passed		
9. Keep records of incidents that are accurate, legible and complete		
10. Ensure your actions are consistent with people’s expressed beliefs and views and acknowledge the benefits of diversity		
11. Promote anti-discriminatory practice in ways which are consistent with legislative frameworks and organisational policy		
12. Take appropriate action to minimise the impact of discrimination and oppression on people		
13. Seek advice and guidance when you have difficulty promoting equality and diversity		
14. Record information which is consistent with the promotion of equality and diversity		
15. Ensure that information stored in, and retrieved from, recording systems is consistent with the requirements of legislation and organisational policy		
16. Maintain records which are accurate and legible and contain only the information necessary for the record’s purpose		
17. Disclose information only to those who have the right and need to know once proof of identity has been obtained		
18. Take appropriate precautions when communicating confidential or sensitive information to those who have the right and need to know it		

11. Make Use of Supervision (GEN36)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Performance criteria	Date achieved	Assessor signature
1. With your line manager identify the nature of the supervision you require and consider any possible changes to the current supervision		
2. In conjunction with your line manager, select a qualified supervisor in the organisation to best meet your needs		
3. Agree the frequency of supervision necessary for safe, effective practice with your line manager and supervisor		
4. Clarify and agree with your supervisor: <ul style="list-style-type: none"> • roles • joint responsibilities • commitments • aims and objectives • ways of working • arrangements for monitoring and reviewing the supervision • the timing and process of changing or ending the supervisory relationship 		
5. Recognise appropriate cases and aspects of your work which require attention in supervision		
6. Bring mistakes and difficult moments in call handling to supervision		
7. Manage and use the anxieties around supervision to engage in non-defensive reflection, during and following, supervision		
8. Develop the ability to question and challenge your supervisor and use this as a tool for your own development		
9. Use your reflections on the supervisory relationship in supervision and to inform aspects of your work with individuals		
10. With your supervisor and/or line manager review the process, outcomes and continuing effectiveness of supervision against the aims and objectives		
11. identify unresolved issues, future supervision requirements and ways of achieving these in discussion with your line manager		

11. Make Use of Supervision (GEN36) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Comments and Action Plan

12. Develop your Own Knowledge and Practice (SCDHSC0023)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout. Ensure you use CDSS to triage calls		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individuals needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local policies and protocols		

Comments and Action Plan

13. Ensure Personal Fitness For Work (GEN1)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/372/>

Performance criteria	Date achieved	Assessor signature
1. Make sure that you are fit for work		
2. Report any personal episodes of illness and infection which could compromise your work to the person in charge of your shift		
3. Report any episodes of illness or infection in close social contacts which could compromise your work to the person in charge of your shift		
4. Visit your General Practitioner or Occupational Health Service when situations occur that may compromise work		
5. Keep your manager fully informed of the need to be away from work		
6. Maintain a clean and healthy personal status		
7. Promptly resolve problems of personal hygiene before risk of cross infection can occur		
8. Ensure that all necessary health promotion schemes such as vaccination for work and social activities are taken up as advised by the Occupational Health Department		
9. Comply with national regulations related to viral antigen testing before starting and during employment when involved in exposure prone procedures		

Comments and Action Plan

14. Undertake Coaching or Mentoring (LSICM05)

<https://tools.skillsforhealth.org.uk/external/LSICM05.pdf>

Performance criteria	Date achieved	Assessor signature
1. Plan coaching or mentoring objectives and goals with colleague to meet identified motivations, priorities and aspirations		
2. Agree approaches to deliver the planned objectives and goals		
3. Apply coaching or mentoring methods to achieve agreed objectives and goals		
4. Elicit motivation in colleague to work towards their objectives and goals		
5. Provide opportunities for colleague to review progress toward achievement of their goals		
6. Check with your colleagues that the coaching or mentoring has met their needs and expectations		
7. Take timely action to support colleagues who may not be achieving their objectives and goals		
8. Enable colleague to take responsibility for their objectives and goals		
9. Review the coaching or mentoring agreement and reflect on progress toward objectives and goals with your colleague		
10. Enable colleague to revise objectives, modify goals and plan new ones based on their progress		
11. Confirm with colleague the course of action and methods to achieve outstanding goals, modified goals or newly identified goals		
12. Agree and record the interactions, outcomes and progress towards objectives and goals with colleague in accordance with organisational requirements		

Comments and Action Plan

Senior Health Advisor

Job description	
Post title:	Senior Health Advisor
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 4
Location:	

1. The Post

1.1 Post Description

Senior Health Advisors (level 4) is a worker who competently advises on health or social care (or both) to and for people. They have a required level of knowledge and skill beyond that of the traditional health advisor. The senior health advisor would be able to deliver elements of health and social care and provide advice in domains that have previously only been within the remit of registered professionals (clinical advisors) (www.skillsforhealth.org.uk).

You will be required to follow a programme of learning and development, which will enable you to complete the required service competences.

You will be part of a team based at and will provide safe and effective health assessment, information and advice, within protocols, to the general public. You will utilise the Clinical Decision Support System (CDSS) and other local protocols to guide decision-making.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.ukstandards.org.uk), which can be used as evidence towards educational awards.

2.1 Call Handling

- **Receive requests for assistance, treatment or care (GEN58)** to IUC / NHS 111 call centre. The requests may be from members of the public, healthcare practitioners or other professionals.
- **Interact with individuals using telecommunications (GEN21.2012)**. You will answer the calls in an efficient and courteous manner using organisational standards and protocols. This will involve triaging patient calls using the CDSS.
- **Communicate effectively in a healthcare environment (GEN97)** with colleagues as well as callers to the IUC / NHS 111 service. You will need to adjust the way you communicate to fit their knowledge and deal with callers with empathy and understanding. You will accurately record and check or amend details on the call logging computer system.
- **Direct requests for assistance, care or treatment using protocols or guidelines (GEN59)** by signposting patients/callers to the most appropriate care/service using the Directory of Services where appropriate, guided by the CDSS . This includes making judgements around what may or may not be significant changes in a patient's condition. This may involve recognition and appropriate response to emergency situations.
 - **Communicate risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6)**

working to protocols and CDSS. This will include advising callers enquiring about the following issues:

- 1 Dental pain/toothache without injury (advice re pain relief).
- 2 TOXBASE
- 3 Health and Social Information
- 4 Home Management Advice (e.g. cough, abdominal pain, vomiting, skin problems, sore throat, earache)

- **Support the safeguarding of individuals (SCDHSC0024)** following local protocols and standards. Relate to others in ways which support rights, inclusion and wellbeing of individuals, supporting individuals to keep themselves safe.
- **Contribute to the effectiveness of teams (SCDHSC0241)**. Work as part of a multidisciplinary team, actively contributing to service improvements where appropriate. Assist new members of staff. Assist in general administrative and clerical duties. Provide cover for sickness, bank holidays, annual leave of other health advisors. Work flexibly across sites as required by the service.

2.2 General Duties

- **Act within the limits of your competence and authority (GEN63)**, i.e. work to CDSS's competencies and adhere to local protocols and procedures.
- **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. Adhere to health and safety policies and report incidents and risks identified through Datix or via line manager.
- **Comply with legal requirements for maintaining confidentiality (CHS169)** by maintaining strict confidentiality of all issues concerned with the service. Adhere to requirements of the Data Protection Act 1984, information governance and Caldicott Principles.

- **Promote the rights and diversity of individuals (SCDHSC311).** This includes promoting the capacity of individuals to exercise their rights and responsibilities and promoting a culture which values and respects the diversity of all individuals. It also addresses individuals' rights in relation to information about themselves and the need to promote confidence in individuals that their rights will be upheld in the work setting.

2.3 Managing Self

- **Make use of supervision (GEN36).** Participate in regular supervision in line with local guidelines in order to continually improve your performance and gain support following difficult calls.
- **Develop your own knowledge and practice (SCDHSC0023),** which includes reflecting on your practice, and taking opportunities to improve your practice and apply learning in the workplace.
- **Monitor your own work practices (GEN23)** and undertake reflective practice ensure continuous improvement and that local targets and performance indicators are met. Ensure you remain up to date with new information and system changes.
- **Ensure personal fitness for work (GEN1)** presenting a positive image of self and the organisation. Maintain professional conduct including appearance at all times.

2.4 Developing Others

- **Undertake coaching or mentoring (LSICM05)** with new health advisors to support them in the IUC / NHS 111 call centre and their use of CDSS. This could include delivering CDSS training to new health advisors.
 - **Provide supervision to other individuals (GEN35)** including peers, health advisors and service advisors to support their ongoing development.

3. Probationary periods

All staff new to the organisation are required to undertake CDSS training. Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Senior Health Advisor

Requirements	Essential	Desirable	How identified
Qualifications	Trained in the relevant clinical decision support system or relevant level 4/5 qualification and willing to undertake training in an appropriate system Educated to GCSE or Functional Skills level and possesses a fundamental level of Maths, English and ICT skills	Minimum GCSE level English and Maths or equivalent Typing/word processing skills or qualification	Application Form Copies of Qualification Certificates Interview/test
Experience	Previous experience working within IUC / NHS 111 call centre as a health advisor or other clinical experience in a healthcare setting	Computer experience Previous experience working in a team or with stakeholders across a range of settings	Application Form Interview References
Training	Willing and able to undertake higher education (level4/5) training to support the role Willing and able to participate in competency work based training programme. Willing and able to undertake train the trainer course Commitment to Continuous Professional Development (CPD) and lifelong learning	Knowledge of the client group and evidence of related training Previous competency-based training in relevant field	Application Form Interview
Practical / intellectual skills	Ability to use own initiative as appropriate Ability to stay calm in the event of the unexpected and under pressure Ability to communicate with a variety of different people and build rapport Ability to follow written and verbal instructions Ability to switch between activities required by the service Ability to work to strict deadlines with accuracy Ability to undertake competency-based training both initially and as ongoing requirement for the post to meet service requirements		Application Form Interview
Health	Able to fulfil the health requirements of the post as identified in the Job Description, taking into account any reasonable adjustments recommended by Occupational Health		Health at Work Form
General	Must be eligible to work in the UK Demonstrate ability to work in a team Able to use initiative and be aware of limitations Ability to deal sensitively with distressing, emotional situations Ability to relate to others and adapt approach accordingly Able to work unsocial hours, including 24/7 shift work and bank holidays		Application Form Interview

job description

person specification

core competences

Senior Health Advisor

1. Communication	Date achieved	Assessor signature
Level 3 - Develop and maintain communication with people about difficult matters and/or in difficult situations. For example:		
<ul style="list-style-type: none"> Identifies the impact of contextual factors on communication 		
<ul style="list-style-type: none"> Adjust communication to take account of others' culture, background, knowledge and preferred way of communicating 		
<ul style="list-style-type: none"> Provides feedback to others on their communication where appropriate 		
<ul style="list-style-type: none"> Shares and engages thinking with others 		
<ul style="list-style-type: none"> Maintains the highest standards of integrity when communicating with patients and the wider public 		
Level 4 - Develop and maintain communication with people on complex matters, issues and ideas and/or in complex situations		
<ul style="list-style-type: none"> Encourages effective communication between all involved 		
<ul style="list-style-type: none"> Develops partnerships and actively maintains them 		
<ul style="list-style-type: none"> Anticipates barriers to communication and takes action to improve communication 		
<ul style="list-style-type: none"> Articulates a vision for trust focus which generates enthusiasm and commitment from both employees and patients/wider public 		
<ul style="list-style-type: none"> Is persuasive in putting forward own view and that of the organisation 		
<ul style="list-style-type: none"> Communicates effectively and calmly in difficult situations and with difficult people 		
Comments and Action Plan		

Senior Health Advisor

2. Personal and People Development	Date achieved	Assessor signature
Level 3 – Develop oneself and contribute to the development of others. For example:		
<ul style="list-style-type: none"> Assesses how well last year’s objectives were met and helps to set this year’s objectives 		
<ul style="list-style-type: none"> Takes responsibility for meeting own development needs 		
<ul style="list-style-type: none"> Identifies development needs for others’ emerging work demands and future career aspirations 		
<ul style="list-style-type: none"> Enables opportunities for others to apply their developing knowledge and skills 		
<ul style="list-style-type: none"> Actively provides learning and development opportunities to others 		
<ul style="list-style-type: none"> Actively contributes to the evaluation of the effectiveness of others’ learning/development opportunities and relates this to other team members 		
Comments and Action Plan <div style="border: 1px solid black; height: 150px; width: 100%;"></div>		

Senior Health Advisor

3. Health, Safety and Security	Date achieved	Assessor signature
Level 2 - Monitor and maintain health, safety and security of self and others. For example:		
<ul style="list-style-type: none"> Looks for potential risks to self and others in work activities and processes 		
<ul style="list-style-type: none"> Manages identified risk in the best way possible 		
<ul style="list-style-type: none"> Works in a way that complies with legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Takes action to manage an emergency, calling for help immediately when appropriate 		
<ul style="list-style-type: none"> Reports actual or potential problems that may put health, safety or security at risk and suggests solutions 		
<ul style="list-style-type: none"> Supports and challenges others in maintaining health, safety and security at work 		

Comments and Action Plan

job description

person specification

core competences

Senior Health Advisor

4. Service Improvement	Date achieved	Assessor signature
Level 1 - Make changes in own practice and offer suggestions for improving services. For example:		
<ul style="list-style-type: none"> • Discusses with line manager changes that might need making to own work practice and why 		
<ul style="list-style-type: none"> • Adapts own work and takes on new tasks as agreed and asks for help if needed 		
<ul style="list-style-type: none"> • Helps evaluate the service when asked to do so 		
<ul style="list-style-type: none"> • Passes on any good ideas to improve services to line manager or appropriate person 		
<ul style="list-style-type: none"> • Alerts manager if new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		
Level 2 - Contribute to the improvement of services:		
<ul style="list-style-type: none"> • Discusses with team the likely impact of changing policies, strategies and procedures on practice. Also, about changes the team can make and how to make them effective 		
<ul style="list-style-type: none"> • Takes on new work and make changes to own work when agreed, requesting relevant help if needed 		
<ul style="list-style-type: none"> • Supports colleagues in understanding and making agreed changes to their work 		
<ul style="list-style-type: none"> • Evaluates own and others' work when needed 		
<ul style="list-style-type: none"> • Make suggestions to improve the service 		
<ul style="list-style-type: none"> • Constructively identifies where new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		
Comments and Action Plan		

Senior Health Advisor

5. Quality	Date achieved	Assessor signature
<p>Level 1 - Maintain the quality of own work. For example:</p>		
<ul style="list-style-type: none"> • Works as required by the organisation and professional policies and procedures 		
<ul style="list-style-type: none"> • Works within the limits of own competence and area of responsibility and refers any issues that arise beyond these limits to the relevant people 		
<ul style="list-style-type: none"> • Works closely with own team and asks for help if necessary 		
<ul style="list-style-type: none"> • Reports any problems, issues or errors made with work immediately to line manager and helps to solve or rectify the situation 		
<p>Level 2 - maintain quality in own work and encourage others to do so:</p>		
<ul style="list-style-type: none"> • Follows organisational and professional policies and procedures and other quality approaches as required (e.g. quality indicators). Encourages others to do the same. Maintains professional registration if has one 		
<ul style="list-style-type: none"> • Works within the limits of own competence and area of responsibility and accountability. Gets help and advice where needed 		
<ul style="list-style-type: none"> • Works to support the team. Can be counted on when people ask for help or support (e.g. work flexibly to cover rotas) 		
<ul style="list-style-type: none"> • Prioritises own workload and manages own time to ensure calls are answered within quality target time 		

Comments and Action Plan

job description

person specification

core competences

Senior Health Advisor

6. Equality and Diversity	Date achieved	Assessor signature
Level 1 - Communicate with a limited range of people on day-to-day matters. For example:		
<ul style="list-style-type: none"> • Acts in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Treats everyone with dignity and respect, allows others to express their views even when different from one's own 		
<ul style="list-style-type: none"> • Does not discriminate or offer a poor service because of others' differences or different viewpoints 		
Level 2 - Support equality and value diversity		
<ul style="list-style-type: none"> • Challenges bias, prejudice and intolerance if appropriate or brings it to the attention of a manager 		
<ul style="list-style-type: none"> • Uses plain language when carrying out duties 		
<ul style="list-style-type: none"> • Aware of the impact of own behaviour on others 		

Comments and Action Plan

1. Receive Requests for Assistance, Treatment or Care (GEN58)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/415/>

Performance criteria	Date achieved	Assessor signature
1. Be able to explain clearly and calmly to the caller your own role and its scope		
2. Request clearly (explain if needed): <ul style="list-style-type: none"> • what information you need • the reasons why you need the information and why some questions are needed at the start of the call • with whom the information will be shared 		
3. Communicate with the individual in a sensitive and respectful manner which promotes confidence, reduces anxiety and maintains their privacy and dignity		
4. Communicate with the individual in a manner consistent with: <ul style="list-style-type: none"> • their level of understanding • their culture and background – use a translator if needed • their preferred ways of communicating • their need for reassurance and support • the circumstances in which they are making the request 		
5. Confirm the personal and contact details of the individual who requires assistance, treatment or care and, where appropriate, those for the person making the request on behalf of the individual		
6. Use the CDSS to obtain the presenting history, symptoms and other relevant information as fully, accurately and sequentially as the circumstances of the request permit		
7. Ensure that you have obtained the information required so that the individual receives appropriate advice, further assistance and treatment or care using the CDSS. Escalate as per local protocols and CDSS if indicated		
8. Take appropriate action based upon all information received and the disposition arrived at via CDSS		
9. Record, store and share, if appropriate, the information received, in line with patient confidentiality, data protection and other relevant legislation, protocols and guidelines		
10. Adhere to legislation, protocols and guidelines when giving advice to individuals		
11. Recognise when a request is outside your remit and advise the individual of an alternative service		
12. Recognise, using CDSS, when a request requires a direct referral on behalf of the patient or caller		
13. Recognise the boundary of your role and responsibility and the situations that are beyond your competence and authority and escalate to a more senior member of staff		

1. Receive Requests for Assistance, Treatment or Care (GEN58) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/415/>

Comments and Action Plan

2. Interact with Individuals using Telecommunication (GEN21.2012)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3380/>

Performance criteria	Date achieved	Assessor signature
1. Respond to individuals according to organisational policies, answering the call within agreed standard		
2. Identify any constraints on individuals and the circumstances in which the interaction is being made. Ensure the caller is with the patient		
3. Ensure you have recorded and checked the individual's demographic details at the start of the call		
4. Encourage individuals to identify symptoms and to focus on their requirements using CDSS and local protocols and take appropriate action to deal with it. Assess whether there is any risk or dangers facing the individual		
5. Provide suitable opportunities for individuals to sustain the interaction		
6. Encourage individuals to provide additional information on their situation or requirements		
7. Respond to individuals' immediate requirements at each stage during the interaction, guided by CDSS		
8. Provide suitable indications to reassure individuals of continued interest		
9. Identify any signs of increased stress during interactions and establish their significance		
10. Provide clear information on the requirement to end the interaction		
11. End interactions according to the guidelines and procedures of your organisation, ensuring standard information on what to do if symptoms worsen is given		
12. Identify situations where it would be dangerous or disadvantageous to the interest of the individual to terminate the interaction and follow local protocols to manage this		
13. Follow local protocols and CDSS to take the appropriate action to resolve dangerous situations		
14. Where you are providing a confidential service, ensure the anonymity of individuals, self, and colleagues is maintained according to the procedures of the service		
15. Record details of interactions in the appropriate systems		

Comments and Action Plan

3. Communicate Effectively in a Healthcare Environment (GEN97)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3001/>

Performance criteria	Date achieved	Assessor signature
1. Acknowledge and respond to communication promptly		
2. Communicate clearly and coherently taking into account the needs of individuals		
3. Select the most appropriate method of communication for the individuals		
4. Ensure that the environment for communication is as conducive as possible for effective communication		
5. Adapt your communication style to suit the situation		
6. Identify any communication barriers with the individuals and take the appropriate action		
7. Clarify points and check that you and others understand what is being communicated		
8. Actively listen and respond appropriately to any questions and concerns raised during communications		
9. Establish lines of communication which enable you to communicate with individuals in other locations in times of need or emergency		
10. Maintain confidentiality of information where appropriate to do so		

Comments and Action Plan

4. Direct Requests for Assistance, Care or Treatment using Protocols/Guidelines (GEN59)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/412/>

Performance criteria	Date achieved	Assessor signature
1. Introduce yourself and explain the process you will go through in order to direct their request i.e. the need to ask questions to clarify (follow local protocols)		
2. Clarify and confirm that the caller is with the patient and accepts the actions being taken to direct their request		
3. Select and apply the correct protocols and guidelines appropriate to the individual, and the context and circumstances in which the request is being made		
4. Adhere to the sequence of questions within the protocols and guidelines		
5. Phrase questions in line with the requirements of the protocols and guidelines, adjusting your phrasing within permitted limits to enable the individual to understand and answer you better		
6. Accurately and appropriately record responses and other information obtained of relevance during immediate interaction, treatment or care of the individual		
7. Using CDSS determine which service or assistance the individual requires and using Directory of Services signpost as appropriate or refer directly if indicated		
8. Seek prompt advice and/or early exit the call when indicated by CDSS or when a clear referral cannot be made or when an alternative service is not known, or if the caller declines the disposition		
9. Pass on all information obtained to the organisation who will be receiving the individual, as necessary and in line with patient confidentiality and data protection requirements		
10. Inform the caller what course of action you are taking (the disposition) and what will happen next		
11. Explain clearly the time frame within which the caller can expect to be given further assistance, giving them interim guidance as per CDSS, and guidance on calling back if symptoms worsen		
12. Recognise when a request is beyond your remit and transfer the call to the appropriate colleague or service		
13. Recognise when a request is outside the remit of your service and advise the caller of more appropriate services if known		

4. Direct Requests for Assistance, Care or Treatment using Protocols/Guidelines (GEN59) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/412/>

Comments and Action Plan

5. Communicate the risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2642/>

Performance criteria	Date achieved	Assessor signature
1. Keep up to date about hazards and risks by using reliable sources of expertise and information (for example TOXBASE), to enable you to provide accurate advice and information on anticipated risks		
2. Communicate with individuals in a vocabulary, manner and pace that is appropriate to them		
3. Where individuals are seeking advice in relation to risks, gather information from them guided by CDSS and other sources such as TOXBASE and NHS Choices to enable you to make a realistic assessment of: <ul style="list-style-type: none"> • their perception of the risks • the actual risks in the situation 		
4. Where necessary, consult with colleagues, or access expert information in other ways, to make an accurate assessment of the situation and the risks involved, and to give appropriate advice. Escalate the call if outside your scope		
5. Provide information and advice, guided by CDSS and protocols to enable individuals to reach a better understanding of the situation and the likely risks within it		
6. Provide advice on courses of action the individuals should take, where appropriate, based on the disposition identified from CDSS and local protocols to assess the priorities in the situation, such as: <ul style="list-style-type: none"> • contact other agencies, urgently or routinely • take preventive measures • be reassured that the risks are slight 		
7. Record the information and advice you have given clearly and accurately		

Comments and Action Plan

6. Support the Safeguarding of Individuals (SCDHSC0024)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
i) Maintain your understanding and awareness of harm, abuse and safeguarding:		
1. Demonstrate understanding of factors, situations and actions that may cause or lead to harm and abuse		
2. Demonstrate understanding of signs and symptoms picked up in a telephone triage that may indicate that an individual has been, or is in danger of being, harmed or abused		
3. Demonstrate understanding of local procedures and your own accountability where there are concerns that an individual has been, or is in danger of being, harmed or abused		
4. Demonstrate understanding of the role of different agencies and the need for multi-agency working in safeguarding		
5. Demonstrate understanding of the actions you need to take when harm or abuse is suspected or has been disclosed, in line with local procedures and the responsibilities and boundaries of your role		
6. Demonstrate understanding of actions you must take and those you must avoid in order to protect the integrity of telephone evidence relating to possible harm or abuse		
7. Reflect on your own behaviour and values to ensure that they do not contribute to situations, actions or behaviour that may be harmful or abusive		
ii) Support practices that help to safeguard individuals from harm or abuse:		
1. Respond to individuals according to organisational policies. Recognise actions, behaviours and situations that may lead to harm or abuse		
2. Recognise signs from verbal communication that may indicate an individual has been, or is in danger of being, harmed or abused		
3. Report, in accordance with work setting requirements, any changes, events or occurrences that cause you concern about the welfare of an individual		
4. Seek support in situations beyond your experience or expertise		
5. Use supervision and support to deal with your own reactions to possible harm or abuse, within confidentiality requirements		

6. Support the Safeguarding of Individuals (SCDHSC0024) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
iii) Work in ways that support the rights, inclusion and wellbeing of individuals:		
1. Ask the individual about their preferences		
2. Ensure your own actions support the individual in person centred ways		
3. Ensure your own actions respect the individual's dignity, privacy, beliefs, preferences, culture, values and rights		
4. Ensure your own actions support the individual's self-esteem, sense of security and belonging		
5. Ensure your own actions support the individual's active participation, independence and responsibility		
6. Ensure your own actions support equity and inclusion and do not discriminate		
7. Take appropriate steps where the behaviour and actions of others do not support the rights, inclusion and wellbeing of the individual (i.e. refer to line manager)		

Comments and Action Plan

7. Contribute to the Effectiveness of Teams (SCDHSC0241)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
i) Agree your role and responsibilities within the team:		
1. Access information about the team, its objectives and its purpose		
2. Ensure you understand the information about the team, its objectives and its purpose		
3. Work with other team members to ensure you understand your role and responsibilities and how they contribute to the overall objectives and purpose of the team		
4. Work with other team members to understand their roles and responsibilities		
5. Work with other team members to clarify how you can and should contribute to team activities, objectives and purposes		
ii) Participate effectively as a team member:		
1. Carry out your agreed role and responsibilities within the team		
2. Inform other members of the team about your activities		
3. Ensure your behaviour towards other team members helps the team to function effectively		
4. Complete your commitments to other team members effectively and according to overall work priorities		
5. Where you cannot complete any commitments within timescales specified, immediately inform appropriate team members		
6. Respond to differences of opinion constructively and in ways which respect other team members' points of view		
7. Where you experience problems in working effectively with other team members, seek appropriate advice and guidance		

7. Contribute to the Effectiveness of Teams (SCDHSC0241) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
iii) Contribute to improving the team's effectiveness:		
1. Offer supportive and constructive assistance to team members		
2. Offer suggestions, ideas and information that will benefit team members and improve team working		
3. Invite feedback from others about how you carry out your role in the team		
4. Use suggestions and information from others (e.g. call audits and quality target information) to improve your practice as a team member		
5. Take responsibility for agreeing and undertaking any development and learning that will enable you to carry out your role and responsibilities within the team more effectively		

Comments and Action Plan

8. Act Within the Limits of Your Competence and Authority (GEN63)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/85/>

Performance criteria	Date achieved	Assessor signature
1. Adhere to legislation, protocols and guidelines relevant to your role and field of practice		
2. Work within organisational systems and requirements as appropriate to your role		
3. Recognise the boundary of your role and responsibility and seek supervision or escalate the call when situations are beyond your competence and authority		
4. maintain competence within your role and field of practice		
5. Use relevant research based protocols and guidelines as evidence to inform your practice		
6. Promote and demonstrate good practice as an individual and as a team member at all times		
7. Identify and manage potential and actual risks to the quality and safety of practice		

Comments and Action Plan

9. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
i) Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
ii) Reduce the risks to health and safety at work:		
1. Control those health and safety risks within your capability and job responsibilities		
2. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
3. Pass on suggestions for reducing risks to health and safety to the responsible people		
4. Make sure your behaviour does not endanger the health and safety of you or others at work. e.g. ensure your workspace and headset are cleaned regularly		
5. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
6. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
7. Make sure that your personal presentation and behaviour at work: <ul style="list-style-type: none"> • protects the health and safety of you and others • meets any legal responsibilities, and • is in accordance with workplace instructions 		

9. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1) *continued*

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Comments and Action Plan

job description

person specification

core competences

10. Comply with Legal Requirements for Maintaining Confidentiality (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individual's needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local policies and protocols		

Comments and Action Plan

11. Promote the rights and diversity of individuals (SCDHSC311)

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's capacity to exercise their rights and responsibilities		
1. Provide up to date information, appropriate explanations and support to enable the individual and key people to understand their rights and responsibilities		
2. Provide up to date information, appropriate explanations and support to enable the individual and key people to exercise their rights		
3. Work in ways that demonstrate to others how to respect and promote the views, choices and wishes of individuals and key people		
4. Work in ways that demonstrate to others how to promote active participation to maximise the individual's control over their own life		
5. Demonstrate through your practice how to promote the right of the individual to make informed choices and decisions about their life and well-being, and about taking and managing potential and actual risks		
6. Interpret the rights and responsibilities of the individual in a way that is consistent with the law, regulation and work setting requirements		
7. Provide up to date information, appropriate explanations and support to enable the individual and key people to acknowledge the complexities of decisions that may need to be made in order to balance their rights, preferences and responsibilities		
8. Seek assistance when conflicts arise that you cannot deal with		

11. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote a culture that values and respects diversity		
9. Work with the individual, key people and others to understand the cultural experience, background and beliefs of the individual		
10. Identify how and where to access expertise on specific cultures or aspects of culture		
11. Access expertise and advice from people, groups and networks to enhance your understanding of the individual's culture, background and beliefs		
12. Work with the individual, key people and others to enhance aspects of the environment, practice and behaviour that are beneficial to an inclusive culture		
13. Work with the individual, key people and others to address aspects of the environment, practice and behaviour that may create barriers to an inclusive culture		
14. Ensure that activities and practices use the individual's culture and life experiences as a resource		
15. Support the individual to consider how they may wish to build upon their cultural experience in ways that promote participation, inclusivity and co-operation with others		
16. Demonstrate through your practice how to support the individual's right to communicate using their preferred language and method		
17. Model behaviour that encourages others to work in ways that promote equality and respect diversity		
18. Challenge practices and processes that prevent the individual having equal opportunity to services, support and facilities		
19. Seek assistance when you are having difficulty promoting equality and diversity		

11. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's rights in relation to information about themselves		
20. Work in ways that demonstrate to others how to support the right of the individual to access information about themselves		
21. Disclose information about the individual only to those who have the right and need to know, and once proof of identity has been obtained		
22. Encourage others to disclose information only to those who have the right and need to know, and once proof of identity has been obtained		
23. Ensure that records and reports about work with the individual are completed within confidentiality agreements and according to legal and work setting requirements		
24. Maintain confidentiality when storing and accessing information about the individual		
25. Work in ways that demonstrate to colleagues how to respect and protect the privacy of the individual when handling information about them		

11. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote confidence that the rights of individuals will be upheld in the work setting		
26. Ensure your own practice is always consistent with the law, regulation and work setting requirements		
27. Support others to work within the law, regulation and work setting requirements		
28. Use sensitively and responsibly the influence that accompanies your job role and responsibilities		
29. Support others to use their influence sensitively and responsibly		
30. Work in ways that demonstrate you are honest, trustworthy, reliable and dependable at all times		
31. Encourage others to be honest, trustworthy, reliable and dependable in their work		
32. Work with others to ensure all communication is appropriate, open, accurate and straightforward		
33. Ensure that you honour your work commitments and support colleagues to do the same		
34. Ensure that you and others declare any personal interests that might influence judgements and practice		
35. Work in ways that demonstrate to others how to support the right of the individual to compliment, comment and complain about services they are receiving and to have any comments and complaints taken seriously		

Comments and Action Plan

12. Make Use of Supervision (GEN36)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Performance criteria	Date achieved	Assessor signature
1. With your line manager identify the nature of the supervision you require and consider any possible changes to the current supervision		
2. In conjunction with your line manager, select a qualified supervisor in the organisation to best meet your needs		
3. Agree the frequency of supervision necessary for safe, effective practice with your line manager and supervisor		
4. Clarify and agree with your supervisor: <ul style="list-style-type: none"> • roles • joint responsibilities • commitments • aims and objectives • ways of working • arrangements for monitoring and reviewing the supervision • the timing and process of changing or ending the supervisory relationship 		
5. Recognise appropriate cases and aspects of your work which require attention in supervision		
6. Bring mistakes and difficult moments in call handling to supervision		
7. Manage and use the anxieties around supervision to engage in non-defensive reflection, during and following, supervision		
8. Develop the ability to question and challenge your supervisor and use this as a tool for your own development		
9. Use your reflections on the supervisory relationship in supervision and to inform aspects of your work with individuals		
10. With your supervisor and/or line manager review the process, outcomes and continuing effectiveness of supervision against the aims and objectives		
11. identify unresolved issues, future supervision requirements and ways of achieving these in discussion with your line manager		

12. Make Use of Supervision (GEN36) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Comments and Action Plan

13. Develop your Own Knowledge and Practice (SCDHSC0023)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Performance criteria	Date achieved	Assessor signature
i) Reflect on your current practice		
1. Clarify with others (e.g. line manager, mentor/clinical supervisor) the skills, knowledge and values required to carry out your job role		
2. Clarify with others (using clinical supervision, appraisal and teaching sessions) the areas of your work where literacy, numeracy and information technology skills are necessary		
3. Actively seek feedback from your line manager, mentor and/or clinical supervisor on your use of skills, knowledge and values in your practice		
4. Agree with others the areas of strength in your practice		
5. Reflect with others on the way your values, personal beliefs and experiences may affect your work with individuals		
ii) Plan to develop your knowledge and practice		
1. Seek support from others to identify areas for development within your practice that would help you to carry out your work activities more effectively		
2. Seek advice on development opportunities to achieve development from your line manager, mentor or clinical supervisor		
3. Agree a personal development plan with your line manager and/or supervisor		
4. Secure opportunities for development with the help of your line manager or mentor		
iii) Apply acquired knowledge and skills in your work		
1. Use opportunities with others to reflect on your learning from development opportunities in order to continuously improve your practice		
2. Review how the newly acquired skills and knowledge can be applied in your practice		
3. Confirm with others that it is safe and within your job role before applying new skills and knowledge		
4. Apply new skills and knowledge that have been agreed as appropriate to your job role		
5. Evaluate with others how far your new skills and knowledge have enhanced your work		

13. Develop your Own Knowledge and Practice (SCDHSC0023) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Comments and Action Plan

14. Monitor Your Own Work Practices (GEN23)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2051/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability		
2. Allocate monitoring activities within your work at regular intervals consistent with legal, professional and organisational requirements		
3. Adjust the frequency of monitoring where necessary to ensure compliance with quality systems and whenever risks are identified		
4. Monitor your work activities and outcomes against the relevant quality indicators and standards		
5. Access information from appropriate sources, in conjunction with your team leader, as relevant to the monitoring activity and carry out all monitoring checks correctly and accurately		
6. Obtain the correct and complete data (with your team leader) relevant to the monitoring activity and correctly identify any non-compliance or variance in work activities and outcomes against relevant quality indicators		
7. Report instances of non-compliance or variance with quality standards accurately and promptly to relevant people		
8. Use the monitoring results to improve your working practices and outcomes and access appropriate support to improve your practice where required (i.e. coaching or clinical supervision)		
9. Act on any recommendations to improve performance and quality outcomes, making use of supervision, coaching and additional training		
10. Review any changes to working practices as required to confirm and sustain improvements		
11. Maintain clear, accurate and complete records of your monitoring activities and outcomes in line with current legislation, guidelines, local policy and protocols		

Comments and Action Plan

15. Ensure Personal Fitness For Work (GEN1)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/372/>

Performance criteria	Date achieved	Assessor signature
1. Make sure that you are fit for work		
2. Report any personal episodes of illness and infection which could compromise your work to the person in charge of your shift		
3. Report any episodes of illness or infection in close social contacts which could compromise your work to the person in charge of your shift		
4. Visit your General Practitioner or Occupational Health Service when situations occur that may compromise work		
5. Keep your manager fully informed of the need to be away from work		
6. Maintain a clean and healthy personal status		
7. Promptly resolve problems of personal hygiene before risk of cross infection can occur		
8. Ensure that all necessary health promotion schemes such as vaccination for work and social activities are taken up as advised by the Occupational Health Department		
9. Comply with national regulations related to viral antigen testing before starting and during employment when involved in exposure prone procedures		

Comments and Action Plan

16. Undertake Coaching or Mentoring (LSICM05)

<https://tools.skillsforhealth.org.uk/external/LSICM05.pdf>

Performance criteria	Date achieved	Assessor signature
1. Plan coaching or mentoring objectives and goals with colleague to meet identified motivations, priorities and aspirations		
2. Agree approaches to deliver the planned objectives and goals		
3. Apply coaching or mentoring methods to achieve agreed objectives and goals		
4. Elicit motivation in colleague to work towards their objectives and goals		
5. Provide opportunities for colleague to review progress toward achievement of their goals		
6. Check with your colleagues that the coaching or mentoring has met their needs and expectations		
7. Take timely action to support colleagues who may not be achieving their objectives and goals		
8. Enable colleague to take responsibility for their objectives and goals		
9. Review the coaching or mentoring agreement and reflect on progress toward objectives and goals with your colleague		
10. Enable colleague to revise objectives, modify goals and plan new ones based on their progress		
11. Confirm with colleague the course of action and methods to achieve outstanding goals, modified goals or newly identified goals		
12. Agree and record the interactions, outcomes and progress towards objectives and goals with colleague in accordance with organisational requirements		

Comments and Action Plan

17. Provide Supervision to Other Individuals (GEN35)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2295/>

Performance criteria	Date achieved	Assessor signature
1. Agree with supervisee the type, frequency and purpose of routine contact and how to contact you if they need additional discussion, advice or supervision		
2. Agree with supervisee the confidential nature of the supervision relationship		
3. Maintain contact with supervisee to provide opportunities for feedback, discussion and support		
4. Carry out supervision as agreed (frequency and type)		
5. Enable supervisee to reflect on and make decisions about levels of contact		
6. Enable supervisee to reflect on and make decisions about the objectives and outcomes of their work		
7. Enable supervisee to identify their roles and responsibilities in carrying out their work and to identify the limits of their current competence		
8. Enable supervisee to reflect on and make decisions on how their work relates to evidence based practice		
9. Enable supervisee to reflect on and make decisions on the need for intervention by other specialist workers and agencies		
10. Actively monitor that professional and behavioural boundaries are clear and are being observed by the supervisee in work relationships		
11. Challenge appropriately those individuals who show signs of becoming complacent with the progress of their work and re-emphasise responsibilities and accountabilities at work		
12. Offer supervisee appropriate support to manage their work effectively		
13. Supervise individuals at a sufficient level to ensure they only undertake activities for which they are competent and within their remit		
14. Actively monitor the effect which undertaking different activities has on individuals and take appropriate action where there are concerns that it is detrimental to their health or social wellbeing		

Comments and Action Plan

Team Leader

Job description	
Post title:	Team Leader
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 4
Location:	

1. The Post

1.1 Post Description

Team Leaders (level 4) of the Career Framework require factual and theoretical knowledge in broad contexts within a field of work. Work is guided by standard operating procedures, protocols or systems of work, but the worker makes judgements, plans activities, contributes to service development and demonstrates self-development. They may have responsibility for supervision of some staff. (www.skillsforhealth.org.uk)

You will manage a team of Health Advisors, Senior Health Advisors, based at
 and will provide real time performance management, visible and accessible leadership and coaching to staff in the team. This may be in both face to face and virtual environments. You will be experienced in the use of Clinical Decision Support Systems and local decision making protocols.

You will ensure efficient, high quality, safe service delivery with adherence to National Quality requirements and organisational key performance indicators

You will be required to follow a programme of learning and development, which will enable you to complete the required service competences.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.skillsforhealth.org.uk) and can be used as evidence towards educational awards.

2.1 Leadership and management

- **Develop and sustain productive working relationships with colleagues (CFAM&LDD1)** in order to support real time management of health advisors, senior health advisors, clinical advisors and dental nurses on shift, ensuring safe effective working.
 - **Support and challenge workers on specific aspects of their practice (GEN132)** by assisting call taking staff with Clinical Decision Support Systems queries when requested or through proactively identifying staff on shift who may need support. Ensure any performance concerns are addressed in real time and referred to the service manager as appropriate.
 - **Use information to take effective decisions (CFAM&LEC5)** i.e. interpret and apply performance data to gain a reliable picture of individual and organisational performance. This includes reviewing daily/weekly/monthly performance statistics against contract standards and take corrective action with the team to improve performance.
 - **Manage people's performance at work (CFAM&LDB4)** using data analysis to discuss performance achievements or concerns with staff. Apply the appraisal cycle ensuring review of objectives is undertaken in an ongoing manner and that performance development plans are completed with staff using SMART objectives.
- Have a thorough understanding of contingency arrangements for staff shortages or IT systems failure and ensure escalation following protocols.
- **Help individuals address problems affecting their performance (CFAM&LDC5)** by facilitating feedback to team members following audit, acknowledging achievements and supporting any areas of development identified. Liaise with CQI training team to escalate or discuss performance concerns that have not been resolved through initial coaching.
 - **Quality assure the work in your team (CFAM&LDB3)** by administering the weekly and monthly audit process specifically ensuring adherence to National Quality requirements and Key Performance Indicators relative to the service through team management and whilst supporting the shift. To provide support to patient experience and quality manager when dealing with complaints.
 - **Lead your team (CFAM&LBA3)** by contributing to continuous quality improvement through own practice and through support of others. Demonstrate and contribute to embedding of organisational vision and values. Hold monthly one to one meetings and ensure timely processing of timesheets, monitoring annual leave to ensure team members are requesting and taking leave in a measured and timely manner and supporting team members on return from long term absence. This may involve liaising with CQI Training team to identify learning needs. Ensure breaks are managed effectively without detriment to the service performance.
 - **Induct individuals to their role (CFAM&LDA3)** ensuring contact with new team members at the earliest opportunity to support them in their role and deal with queries. Ensure new starters have appropriate support through their probationary period and ensure objectives are met prior to sign off of probationary

period. Liaise with CQI Training team to ensure awareness of new employee team member progress through their training period.

- **Promote the rights and diversity of individuals (SCDHSC311).** This includes promoting the capacity of individuals to exercise their rights and responsibilities and promoting a culture which values and respects the diversity of all individuals. It also addresses individuals' rights in relation to information about themselves and the need to promote confidence in individuals that their rights will be upheld in the work setting.

2.2 General Duties

- **Act within the limits of your competence and authority (GEN63)** i.e. work to Clinical Decision Support System competences and adhere to local protocols and procedures. Seek advice from clinical advisor as directed by protocols or when you are unsure.
- **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. Adhere to health and safety policies and report incidents and risks identified through reporting systems (e.g. Datix) or via line manager.
 - **Comply with legal requirements for maintaining confidentiality (CHS169)** by maintaining strict confidentiality to all issues concerned with the service and adhere to requirements of the Data Protection Act 1984, information governance and Caldicott Principles.

2.3 Managing self

- **Make use of supervision (GEN36)** i.e. participate in regular supervision in line with local guidelines in order to continually improve your performance and gain support following difficult calls or challenging interaction within your team.
- **Monitor your own work practices (GEN23)** ensuring maintenance of own call taking proficiency and demonstrating in depth knowledge of Clinical Decision Support System and host systems. Contribute to real time and contingency management of shifts as required. Ensure team members audit requirements have been completed as per set standards.
- **Develop and sustain productive working relationships with stakeholders (CFAM&LDD2).** Liaise with key stakeholders and represent the organisation in a timely and professional manner as and when required. Act as a central point of contact and communication for all persons on duty in your team.

2.4 Developing Others

- **Undertake coaching or mentoring (LSICM05)** with new health advisors to support them in the NHS 111/IUC centre and their use of Clinical Decision Support Systems, including the support of junior auditors [or equivalent in OOH].
- **Provide supervision to other individuals (GEN35)** including peers, health advisors, service advisors and coaches to support their ongoing development and to achieve competence.

3. Probationary periods

All staff new to the organisation are required to undergo relevant CDSS training. Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Team Leader

Requirements	Essential	Desirable	How identified
Qualifications	<p>CDSS trained and experienced in using this.</p> <p>CDSS coach trained or willingness to undertake relevant training</p> <p>Functional skills in literacy and numeracy and IT</p>	<p>Minimum GCSE level English and Maths or equivalent.</p> <p>Supervision/mentoring training or qualification.</p> <p>Leadership/management training or qualification</p>	<p>Application Form</p> <p>Copies of Qualification Certificates</p>
Experience	<p>Previous experience working within IUC / NHS 111 call centre or NHS 999 or as a health advisor or previous experience working within a call centre as a team leader.</p>	<p>Previous leadership experience involving engagement and motivation of staff.</p> <p>Previous experience of supporting change</p> <p>Previous experience of management of staff rostering and rota systems</p>	<p>Application Form</p> <p>Interview</p> <p>References</p>
Training	<p>Willing and able to undertake higher apprenticeship education and training to support the role</p> <p>Willing and able to participate in competency work based training programme</p> <p>Commitment to CPD and lifelong learning</p>	<p>Knowledge of the client group and evidence of related training</p> <p>Previous competency based training in relevant field</p>	<p>Application Form</p> <p>Interview</p>
Practical / intellectual skills	<p>Ability to engage with people and motivate and support them to work to high standards (e.g. giving constructive performance related feedback in real time)</p> <p>Able to interpret and apply data from a variety of sources and make meaningful judgements to support performance management.</p> <p>Calm under pressure, able to use initiative and make decisions</p> <p>Excellent interpersonal/communication skills with a variety of media and all levels of staff</p> <p>Able to problem solve</p> <p>Ability to contribute to and manage change</p> <p>Organised with effective time management</p> <p>Fair and balanced approach</p>		<p>Application Form</p> <p>Interview</p>
Job circumstances	<p>Commitment to role</p> <p>Able to work unsocial hours</p> <p>Flexibility to meet service/rota needs</p> <p>Ability to travel to all sites on request and external meeting locations on request</p>		<p>Health at Work Form</p>
General	<p>Must be eligible to work in the UK</p> <p>Demonstrate ability to work in a team</p> <p>Ability to deal sensitively with distressing, emotional situations</p> <p>Conscientious, reliable and resourceful</p> <p>Professional attitude to employment</p> <p>Self starter</p>		<p>Application Form</p> <p>Interview</p>

Team Leader

1. Communication	Date achieved	Assessor signature
Level 4 - Develop and maintain communication with people on complex matters, issues and ideas and/or in complex situations		
<ul style="list-style-type: none"> Identifies and manages risk at work and helps others to do the same 		
<ul style="list-style-type: none"> Makes sure others work in a way that complies with legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Carries out, or makes sure others carry out risk assessments in own area. Checks work area to make sure it is free from risks and conforms to legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Takes the right action when risk is identified 		
<ul style="list-style-type: none"> Finds ways of improving health, safety and security in own area 		

Comments and Action Plan

Team Leader

2. Personal and People Development	Date achieved	Assessor signature
Level 4 -Develop oneself and others in areas of practice		
<ul style="list-style-type: none"> • Contributes to development in the workplace as a learning environment 		
<ul style="list-style-type: none"> • Actively creates opportunities to enable everyone to learn from each other and from external good practice 		
<ul style="list-style-type: none"> • Uses a coaching approach to encourage others to develop 		
<ul style="list-style-type: none"> • Ensures all employees managed have annual appraisals and personal development plans in place and comply with mandatory training 		

Comments and Action Plan

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Team Leader

3. Health, Safety and Security	Date achieved	Assessor signature
Level 3 - Promote, monitor and maintain best practice in health, safety and security		
<ul style="list-style-type: none"> Identifies and manages risk at work and helps others to do the same 		
<ul style="list-style-type: none"> Makes sure others work in a way that complies with legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Carries out, or makes sure others carry out risk assessments in own area. Checks work area to make sure it is free from risks and conforms to legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Takes the right action when risk is identified 		
<ul style="list-style-type: none"> Finds ways of improving health, safety and security in own area 		

Comments and Action Plan

Team Leader

4. Service Improvement	Date achieved	Assessor signature
Level 3 - Appraise, interpret and apply suggestions, recommendations and directives to improve services		
<ul style="list-style-type: none"> Identifies and evaluates potential improvements to the service 		
<ul style="list-style-type: none"> Discusses improvement ideas with appropriate people and agrees a prioritised plan of implementation to take forward agreed improvements 		
<ul style="list-style-type: none"> Presents a positive role model in times of service improvement 		
<ul style="list-style-type: none"> Supports and works with others to help them understand the need for change and to adapt to it 		
<ul style="list-style-type: none"> Enables and encourages others to suggest change, challenge tradition and share good practice with other areas of the organisation 		
<ul style="list-style-type: none"> Evaluates the changes made and suggests further improvements where needed 		
<ul style="list-style-type: none"> Evaluates draft policies and strategies and feeds back thoughts on impacts on users and the public 		

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Team Leader

5. Quality	Date achieved	Assessor signature
Level 3 - Contribute to improving quality		
<ul style="list-style-type: none"> Promotes quality approaches making others aware of the impact of quality 		
<ul style="list-style-type: none"> Understands own role, its scope and how this may change and develop over time in developing a high quality organisation 		
<ul style="list-style-type: none"> Reviews effectiveness of own team and helps and enables others to work as a team 		
<ul style="list-style-type: none"> Prioritises own workload and manages own time in a manner that maintains and promotes high quality 		
<ul style="list-style-type: none"> Evaluates others work in own area and raises quality issues and related risks with the appropriate people 		
<ul style="list-style-type: none"> Supports changes in own area that improves the quality of systems and processes 		
<ul style="list-style-type: none"> Takes appropriate action when there is a persistent problem with quality 		

Comments and Action Plan

Team Leader

6. Equality and Diversity	Date achieved	Assessor signature
Level 3 - Promote equality and value diversity		
<ul style="list-style-type: none"> • Interprets equality, diversity and rights in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Actively acts as a role model in own behaviour and fosters a non-discriminatory culture 		
<ul style="list-style-type: none"> • Promotes equality and diversity in own area and ensures policies are adhered to 		
<ul style="list-style-type: none"> • Manages people and applies internal processes in a fair and equal way 		
Level 4 - Develop a culture that promotes equality and values diversity		
<ul style="list-style-type: none"> • Actively promotes equality and diversity 		
<ul style="list-style-type: none"> • Monitors and evaluates extent to which legislation and policies are applied 		
<ul style="list-style-type: none"> • Monitors and acts on complaints around equality and diversity 		
<ul style="list-style-type: none"> • Actively challenges unacceptable behaviour and discrimination 		
<ul style="list-style-type: none"> • Supports people who need assistance in exercising their rights 		

Comments and Action Plan
Empty space for comments and action plan

1. Develop and Maintain Productive Working Relationships with Colleagues (CFAM&LDD1)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDD1>

Performance criteria	Date achieved	Assessor signature
1. Establish working relationships with relevant colleagues within your organisation		
2. Recognise and respect the roles, responsibilities, interests and concerns of colleagues		
3. Seek to create a climate of trust and mutual respect, particularly where you have no authority, or shared authority, over those you are working with		
4. Seek to understand difficult situations and issues from colleagues' perspectives and provide support, where necessary, to move things forward		
5. Provide colleagues with appropriate information to enable them to perform effectively		
6. Consult colleagues in relation to key decisions and activities and take account of their views		
7. Fulfil agreements made with colleagues and let them know		
8. Advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements		
9. Identify and resolve conflicts of interest and disagreements with colleagues in ways which minimise damage to work activities and to the individuals involved		
10. Monitor and review the effectiveness of working relationships with colleagues in order to identify areas for improvement		
11. Seek and provide feedback in order to improve your own and your colleagues' performance		

Comments and Action Plan

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2. Support and challenge workers on specific aspects of their practice (GEN132)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3898/>

Performance criteria	Date achieved	Assessor signature
1. Encourage and support other workers to: <ul style="list-style-type: none"> • identify their own values, interests and priorities in relation to the work they are undertaking • think through and identify the impact which their own values, interests and priorities have on their own practice and personal life • reflect on their own personal beliefs, preferences and behaviours the effect which they have on how they think about work 		
2. Offer other workers constructive feedback on their practice, their effectiveness within their role and their ability to work with others		
3. Encourage workers to reflect upon and identify: <ul style="list-style-type: none"> • the factors which affect the effectiveness of their practice • which of the identified factors they are able to tackle, and how • those factors for which they need support, and from whom this may come • ways in which their practice can be improved 		
4. Suggest to other workers in a fair and constructive manner: <ul style="list-style-type: none"> • those factors which may be affecting their effectiveness • ways in which their practice could be improved 		
5. Encourage others to challenge any of the workers views which they feel are not reasonable or justifiable		
6. Assist others to: <ul style="list-style-type: none"> • identify realistic and achievable goals for improving their practice/[call handling/use of CDSS] • draw up a realistic and achievable plan for achieving goals • seek support from appropriate people who are in a position and are willing to help them to achieve their goals • identify how and when they should review their progress towards their goals and your role in this 		
7. Offer other workers information and advice to enable them to identify and use effective support systems [e.g.CDSS]		
8. Agree with other workers the nature, frequency and purpose of routine contact and how to contact you if they are in need of additional discussion, advice and supervision		
9. Maintain contact with other workers to provide opportunities for feedback, discussion and support		

2. Support and challenge workers on specific aspects of their practice (GEN132) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3898/>

Performance criteria	Date achieved	Assessor signature
10. Supervise other workers in the manner and at a frequency agreed with them.		
11. Enable other workers to reflect on and make decisions about: <ul style="list-style-type: none"> • levels of contact • the objectives and outcomes of their work • how their work relates to evidence-based practice • the need for intervention by other specialist workers and agencies 		
12. Actively monitor that professional and behavioural boundaries are clear and are being observed by other workers in their work relationships		
13. Challenge appropriately those workers who show signs of becoming complacent with the progress of their work and re-emphasise the importance and purpose of the work		
14. Take the necessary actions to maintain the key focus of others work		
15. Offer others appropriate support to manage their work effectively		
16. Supervise other workers at a sufficient level to ensure they only undertake activities for which they are competent and which are within their remit		
17. Actively monitor the effect which undertaking different activities has on workers and take appropriate action where there are concerns that the activities are detrimental to their health and social well being		

Comments and Action Plan

3. Use information to take effective decisions (CFAM&LEC5)

<https://tools.skillsforhealth.org.uk/external/CFAM&LEC5>

Performance criteria	Date achieved	Assessor signature
1. Identify those who may be affected by the decision and their interests		
2. Engage, where appropriate, those who are able to contribute to the decision-making process or will be affected by the decision		
3. Establish the objectives of the decision to be taken – clarify what you are trying to achieve by taking the decision and check that everyone involved agrees		
4. Identify the information you need to take the decision and the sources of this information [e.g. call quality information]		
5. Obtain sufficient relevant information to allow you to take the decision and verify its accuracy and reliability		
6. Take timely action to remedy inadequate, unreliable, contradictory or ambiguous information		
7. Analyse the information to identify facts, patterns and trends that may impact on your decision [e.g. call quality measures, adherence to CDSS]		
8. Identify and evaluate the range of options open to you		
9. Draw conclusions supported by reasoned arguments and reliable information, clearly stating any assumptions you have made and risks that may be involved		
10. Take decisions: <ul style="list-style-type: none"> • in line with your objectives • within the scope of your authority • consistent with values, policies and guidelines • in time for necessary action to be taken 		
11. Obtain help and advice if: <ul style="list-style-type: none"> • you do not have adequate information • the decision is outside your area of responsibility or scope of authority • your decisions are likely to conflict with values, policies and guidelines 		
12. Communicate your decision and rationale clearly to those who are affected		

Comments and Action Plan

4. Manage people’s performance at work (CFAM&LDB4)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDB4>

Performance criteria	Date achieved	Assessor signature
1. Plan with individuals how overall objectives for your area of responsibility will be achieved, identifying any priorities or critical activities and making best use of the available resources		
2. Delegate responsibilities to individuals on a fair basis, taking account of: <ul style="list-style-type: none"> • their skills, knowledge and competence • their backgrounds and experience • their existing workloads • opportunities for their development 		
3. Agree SMART objectives with individuals, including the standard of performances expected		
4. Agree with individuals how and when progress towards, and achievement of objectives will be monitored, reviewed and evaluated		
5. Ensure individuals are committed to achieving their objectives and understand their unique contribution to team and organisational objectives		
6. Discuss and agree with individuals effective methods for achieving their objectives and the resources, support and supervision they require		
7. Provide individuals with the resources, support and supervision agreed, and/or, where required additional support or resources to deal with unforeseen events or problems		
8. Monitor progress against objectives and evaluate performance against the standard expected at agreed times		
9. Provide individuals with prompt, specific feedback, designed to maintain and improve their performance		
10. Identify any unsatisfactory performance, discuss the causes and agree ways of improving performance with the individuals concerned		
11. Review objectives with individuals at agreed times and evaluate the extent to which they have been achieved		
12. Recognise successful achievement of objectives in line with your organisation’s policy		
13. Review plans, responsibilities and objectives periodically and in the light of changes in personnel and any significant changes to organisational plans and objectives		
14. Communicate plans, responsibilities and objectives and any changes to these clearly to those affected		

4. Manage people's performance at work (CFAM&LDB4) *continued*

<https://tools.skillsforhealth.org.uk/external/CFAM&LDB4>

Comments and Action Plan

5. Help individuals address problems affecting their performance (CFAM&LDC5)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDC5>

Performance criteria	Date achieved	Assessor signature
1. Give people opportunities to approach you with problems affecting their performance		
2. Identify performance issues and bring these promptly to the attention of the individuals concerned		
3. Discuss problems with individuals at a time and place appropriate to the type, seriousness and complexity of problem		
4. Check that individuals understand the level of seriousness of the problem and its cause		
5. Gather and check information to accurately identify the problem and its cause		
6. Discuss the range of alternative courses of action and agree with individuals timely and effective ways of dealing the problem		
7. Refer individuals to support services or specialists, where necessary		
8. Keep confidential records of your discussions with individuals about problems affecting their performance		
9. Ensure your actions are in line with your organisation's policies		

Comments and Action Plan

6. Quality assure the work in your team (CFAM&LDB3)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDB3>

Performance criteria	Date achieved	Assessor signature
1. Check regularly the progress and quality of the work of team members against the standard performance expected [e.g. call pick up time, call length, dispositions, call quality]		
2. Provide team members with prompt, specific feedback designed to maintain and improve their performance		
3. Support team members in identifying and dealing with problems and unforeseen events		
4. Motivate team members to complete the work they have been allocated on time and to the standard required		
5. Provide any additional support and/or resources team members require to complete their work on time and to the standard required		
6. Identify any unsatisfactory performance, discuss the causes and agree ways of improving performance with team members		
7. Recognise successful completion of significant pieces of work by team members		
8. Motivate team members to maintain and continuously improve their performance over time		
9. Use information collected on the performance of team members in any formal appraisal of performance, where appropriate		

Comments and Action Plan

7. Lead your team (CFAM&LBA3)

<https://tools.skillsforhealth.org.uk/external/CFAM&LBA3>

Performance criteria	Date achieved	Assessor signature
1. Clearly communicate the purpose and objectives of the team to all members		
2. Involve members in planning how the team will achieve its objectives		
3. Ensure that each member of the team has individual work objectives and understands how these contribute to achieving the objectives of the team and the organisation as a whole.		
4. Encourage and support team members to achieve their individual work objectives and those of the team and provide recognition when objectives have been achieved		
5. Steer the team successfully through difficulties and challenges		
6. Encourage and recognise creativity and innovation within the team		
7. Empower team members to develop their own ways of working and take their own decisions within agreed boundaries		
8. Encourage team members to take responsibility for their own development needs		
9. Give team members support and advice when they need it especially during periods of setback and change		
10. Motivate team members to present their own ideas and listen to what they say		
11. Encourage team members to take the lead when they have the knowledge and expertise and show willingness to follow this lead		
12. Win, through your performance and behaviour, the trust and support of team members		

Comments and Action Plan

8. Induct individuals to their role (CFAM&LDA3)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDA3>

Performance criteria	Date achieved	Assessor signature
1. Engage appropriate people within your organisation		
2. Ensure you comply with your organisation's induction, equality, diversity and inclusion policies		
3. Seek and make use of specialist resources, where required		
4. Welcome individuals and explain the unique contribution they are expected to make to achieving the objectives of the organisation and their work area.		
5. Explain to individuals the purpose and importance of a structured induction programme		
6. Establish any specific learning and development needs to enable individuals to perform their duties safely and effectively		
7. Establish any specific learning and development needs to enable individuals to perform their duties safely and effectively		
8. Provide individuals with an induction programme to meet their information, learning and development needs		
9. Take account of individuals diverse needs when designing their induction programme		
10. Introduce individuals to the people they will work with, explaining respective roles and how they will interface.		
11. Encourage individuals to take responsibility for monitoring their progress and completing their induction programme		
12. Provide support, supervision and feedback to enable individuals to perform effectively as soon as possible		
13. Obtain feedback and engage individuals in evaluating the effectiveness of their induction programmes and identifying any areas for improvement		

Comments and Action Plan

9. Promote the rights and diversity of individuals (SCDHSC311)

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's capacity to exercise their rights and responsibilities		
1. Provide up to date information, appropriate explanations and support to enable the individual and key people to understand their rights and responsibilities		
2. Provide up to date information, appropriate explanations and support to enable the individual and key people to exercise their rights		
3. Work in ways that demonstrate to others how to respect and promote the views, choices and wishes of individuals and key people		
4. Work in ways that demonstrate to others how to promote active participation to maximise the individual's control over their own life		
5. Demonstrate through your practice how to promote the right of the individual to make informed choices and decisions about their life and well-being, and about taking and managing potential and actual risks		
6. Interpret the rights and responsibilities of the individual in a way that is consistent with the law, regulation and work setting requirements		
7. Provide up to date information, appropriate explanations and support to enable the individual and key people to acknowledge the complexities of decisions that may need to be made in order to balance their rights, preferences and responsibilities		
8. Seek assistance when conflicts arise that you cannot deal with		

9. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote a culture that values and respects diversity		
9. Work with the individual, key people and others to understand the cultural experience, background and beliefs of the individual		
10. Identify how and where to access expertise on specific cultures or aspects of culture		
11. Access expertise and advice from people, groups and networks to enhance your understanding of the individual's culture, background and beliefs		
12. Work with the individual, key people and others to enhance aspects of the environment, practice and behaviour that are beneficial to an inclusive culture		
13. Work with the individual, key people and others to address aspects of the environment, practice and behaviour that may create barriers to an inclusive culture		
14. Ensure that activities and practices use the individual's culture and life experiences as a resource		
15. Support the individual to consider how they may wish to build upon their cultural experience in ways that promote participation, inclusivity and co-operation with others		
16. Demonstrate through your practice how to support the individual's right to communicate using their preferred language and method		
17. Model behaviour that encourages others to work in ways that promote equality and respect diversity		
18. Challenge practices and processes that prevent the individual having equal opportunity to services, support and facilities		
19. Seek assistance when you are having difficulty promoting equality and diversity		

9. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's rights in relation to information about themselves		
20. Work in ways that demonstrate to others how to support the right of the individual to access information about themselves		
21. Disclose information about the individual only to those who have the right and need to know, and once proof of identity has been obtained		
22. Encourage others to disclose information only to those who have the right and need to know, and once proof of identity has been obtained		
23. Ensure that records and reports about work with the individual are completed within confidentiality agreements and according to legal and work setting requirements		
24. Maintain confidentiality when storing and accessing information about the individual		
25. Work in ways that demonstrate to colleagues how to respect and protect the privacy of the individual when handling information about them		

9. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote confidence that the rights of individuals will be upheld in the work setting		
26. Ensure your own practice is always consistent with the law, regulation and work setting requirements		
27. Support others to work within the law, regulation and work setting requirements		
28. Use sensitively and responsibly the influence that accompanies your job role and responsibilities		
29. Support others to use their influence sensitively and responsibly		
30. Work in ways that demonstrate you are honest, trustworthy, reliable and dependable at all times		
31. Encourage others to be honest, trustworthy, reliable and dependable in their work		
32. Work with others to ensure all communication is appropriate, open, accurate and straightforward		
33. Ensure that you honour your work commitments and support colleagues to do the same		
34. Ensure that you and others declare any personal interests that might influence judgements and practice		
35. Work in ways that demonstrate to others how to support the right of the individual to compliment, comment and complain about services they are receiving and to have any comments and complaints taken seriously		

Comments and Action Plan

10. Act within the limits of your competence and authority (GEN63)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/85/>

Performance criteria	Date achieved	Assessor signature
1. Adhere to legislation, protocols and guidelines relevant to your role and field of practice		
2. Work within organisational systems and requirements as appropriate to your role		
3. Recognise the boundary of your role and responsibility and seek supervision where situations are beyond your competence and authority		
4. Maintain competence within your role and field of practice		
5. Use relevant research based protocols and guidelines as evidence to inform your practice		
6. Promote and demonstrate good practice as an individual and as a team member at all times		
7. Identify and manage potential and actual risks to the quality and safety of practice		
8. Evaluate and reflect on the quality of your work and make continuing improvements		

Comments and Action Plan

11. Make sure your actions reduce risks to health and Safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
i) Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
ii) Reduce the risks to health and safety at work:		
1. Control those health and safety risks within your capability and job responsibilities		
2. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
3. Pass on suggestions for reducing risks to health and safety to the responsible people		
4. Make sure your behaviour does not endanger the health and safety of you or others at work. e.g. ensure your workspace and headset are cleaned regularly		
5. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
6. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
7. Make sure that your personal presentation and behaviour at work protects the health and safety of you and others meets any legal responsibilities, and is in accordance with workplace instructions		

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12. Comply with legal requirements for maintaining confidentiality (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individuals needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local polices and protocols		

Comments and Action Plan

13. Make use of supervision (GEN36)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Performance criteria	Date achieved	Assessor signature
1. Identify the nature of the supervision you require		
2. Assess the available supervision in relation to your identified needs		
3. Select a qualified supervisor to best meet your needs		
4. Identify the role and value of supervision as a key component in professional practice		
5. Seek the frequency of supervision necessary for safe effective practice		
6. Clarify the context, accountability and arrangements for supervision, and explore the implications of these with your supervisor		
7. Clarify and agree with your supervisor: <ul style="list-style-type: none"> • roles • joint responsibilities • commitments • aims and objectives • ways of working • arrangements for monitoring and reviewing the supervision 		
8. Negotiate a supervisory contract with your supervisor which: <ul style="list-style-type: none"> • meets the identified purposes of the supervision • identifies the content and agenda for each supervisory session with your supervisor 		
9. Recognise appropriate cases and aspects of your work which require attention in supervision		
10. Bring mistakes and difficult moments in therapeutic practice to supervision		
11. Manage and use the anxieties around supervision to engage in non-defensive reflection, during and following, supervision		
12. Develop the ability to question and challenge your supervisor and use this as a tool for your own development		
13. Use your reflections on the supervisory relationship in supervision and to inform aspects of your work with individuals		
14. Review the process, outcomes and continuing effectiveness of supervision against the aims and objectives		
15. Consider any possible changes to the current supervision		
16. Identify unresolved issues, future supervision requirements and ways of achieving these		

13. Make use of supervision (GEN36) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Comments and Action Plan

14. Monitor your own work practices (GEN23)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2051/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability		
2. Allocate monitoring activities within your work at regular intervals consistent with legal, professional and organisational requirements		
3. Adjust the frequency of monitoring where necessary to ensure compliance with quality systems and whenever risks are identified		
4. Monitor your work activities and outcomes against the relevant quality indicators and standards		
5. Access information from appropriate sources as relevant to the monitoring activity		
6. Carry out all monitoring checks correctly and accurately		
7. Obtain the correct and complete data relevant to the monitoring activity		
8. Correctly identify any non-compliance or variance in work activities and outcomes against relevant quality indicators		
9. Report instances of non-compliance or variance with quality standards accurately and promptly to relevant people		
10. Use the monitoring results to improve your working practices and outcomes		
11. Access appropriate support to improve your practice where required		
12. Act on any recommendations to improve performance and quality outcomes		
13. Review any changes to working practices as required to confirm and sustain improvements		
14. Maintain clear, accurate and complete records of your monitoring activities and outcomes in line with current legislation, guidelines, local policy and protocols		

Comments and Action Plan

15. Develop and sustain productive working relationships with stakeholders (CFAM&LDD2)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDD2>

Performance criteria	Date achieved	Assessor signature
1. Identify external stakeholders and the nature of their interest in the activities and performance of your organisation		
2. Establish working relationships with relevant internal and external stakeholders		
3. Recognise and respect the roles, responsibilities, interests and concerns of stakeholders and, particularly in situations of matrix management, their managers requirements		
4. Seek to create a climate of trust and mutual respect, particularly where you have no authority, or shared authority, over those you are working with		
5. Seek to understand difficult situations and issues from stakeholders' perspectives and provide support, where necessary, to move things forward		
6. Provide stakeholders with appropriate information to enable them to perform effectively		
7. Consult stakeholders in relation to key decisions and activities and take account of their views, including their priorities, expectations and attitudes to potential risks		
8. Fulfil agreements made with stakeholders and let them know		
9. Advise stakeholders promptly of any difficulties and or where it will be impossible to fulfil agreements		
10. Identify and resolve conflicts of interest and disagreements with stakeholders in ways that minimise damage to work and activities and to the stakeholders involved		
11. Monitor and review the effectiveness of working relationships with stakeholders in order to identify areas for improvement		
12. Seek and provide feedback in order to improve your own and stakeholders' performance		
13. Monitor wider developments in order to identify issues of potential interest or concern to stakeholders in the future and to identify new stakeholders		

Comments and Action Plan

16. Undertake coaching or mentoring (LSICM05)

<https://tools.skillsforhealth.org.uk/external/LSICM05.pdf>

Performance criteria	Date achieved	Assessor signature
1. Plan coaching or mentoring objectives and goals with person to meet identified aspirations, motivations and priorities		
2. Agree approaches to deliver the planned objectives and goals		
3. Apply coaching or mentoring methods to achieve agreed objectives and goals		
4. Elicit motivation in people to work towards their objectives and goals		
5. Provide opportunities for the person to review progress toward achievement of their goals		
6. Check with the person that the coaching or mentoring has met their needs and expectations		
7. Take timely action to support people who may not be achieving their objectives and goals		
8. Enable the person to take responsibility for and ownership of their objectives and goals		
9. Review the coaching or mentoring agreement and reflect on progress toward objectives and goals with the person		
10. Enable people to revise objectives, modify goals and plan new ones based on their progress		
11. Confirm with the person the course of action and methods to achieve outstanding goals, modified goals or identified new ones		
12. Agree and record the interactions, outcomes and progress towards objectives and goals with the person in accordance with organisational requirements		

Comments and Action Plan

17. Provide supervision to other individuals (GEN35)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2295/>

Performance criteria	Date achieved	Assessor signature
1. Agree with individuals the nature, frequency and purpose of routine contact and how to contact you if they are in need of additional discussion, advice or supervision		
2. Agree with individuals the confidential nature of the supervision relationship		
3. Maintain contact with individuals to provide opportunities for feedback, discussion and support		
4. Supervise individuals in the manner and at the frequency agreed with them		
5. Enable individuals to reflect on and make decisions about levels of contact		
6. Enable individuals to reflect on and make decisions about the objectives and outcomes of their work		
7. Enable individuals to identify their roles and responsibilities in carrying out their work		
8. Enable individuals to identify the limits of their current competence		
9. Enable individuals to reflect on and make decisions on how their work relates to evidence based practice		
10. Enable individuals to reflect on and make decisions on the need for intervention by other specialist workers		
11. Actively monitor that professional and behavioural boundaries are clear and are being observed by individuals in their work relationships		
12. Challenge appropriately those individuals who show signs of becoming complacent with the progress of their work and re-emphasise their responsibilities and accountabilities		
13. Offer individuals appropriate support to manage their work effectively		
14. Supervise individuals at a sufficient level to ensure that they only undertake activities for which they are competent and which are within their remit		
15. Actively monitor the effect which undertaking different activities has on individuals and take appropriate action where there are concerns that it is detrimental to their health or well being		

Comments and Action Plan

Clinical Advisor

Job description	
Post title:	Clinical Advisor
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 5
Location:	

1. The Post

1.1 Post Description

Clinical Advisors (level 5) will have a comprehensive, specialised, factual and theoretical knowledge within a field of work and an awareness of the boundaries of that knowledge. They are able to use knowledge to solve problems creatively, make judgements which require analysis and interpretation, and actively contribute to service and self-development. They may have responsibility for supervision of staff or training.

They can work with a considerable degree of autonomy, may have line management responsibilities and actively use research findings to enhance and underpin their area of practice. (www.skillsforhealth.org.uk)

You will be responsible for assessing callers with a wide spectrum of clinical conditions; advising them on home care management, next steps

and referring them on to further care when appropriate. The computer-based clinical decision system will facilitate and support the advice given.

IUC / NHS 111 clinical advisors are required to work as part of a multidisciplinary team within the service provided by providing high-quality, evidence-based healthcare to the immediate needs of the patient.

You will demonstrate a commitment to a high-quality service, excellence in clinical practice and continuous professional development, which are all integral to the role and the development of the service.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.ukstandards.org.uk), which can be used as evidence towards educational awards.

2.1 Call Handling (clinical)

- **Receive requests for assistance, treatment or care (GEN58)** at IUC / NHS 111 call centres. This includes front-ending of calls, clinical validation and assessment and provision of support and advice to other call-handling staff (via clinical advice line).
- **Interact with individuals using telecommunications (GEN21.2012)** You will manage the calls in a controlled, professional and courteous manner, treating all patients with compassion, empathy and respect. You will receive calls from patients, carers, colleagues, other healthcare professionals and undertake an assessment of presenting concerns using a CDSS.
- **Communicate effectively in a healthcare environment (GEN97)** with colleagues as well as callers to the IUC / NHS 111 service. You will need to adjust the way you communicate to fit their knowledge and deal with callers with empathy and understanding. You will accurately record and check or amend details on the call logging computer system as well as verifying caller responses.
 - **Assess an individual's health status [remotely] (CHS39)**, using clinical knowledge, probing and advanced communication skills in order to make decisions on the most appropriate action and provide effective home care advice to callers. You will facilitate the patient pathway through primary, secondary, community

and tertiary care. This may need you to **retrieve and reconcile information about an individual's medication (PHARM29.2016)** escalating appropriately as necessary.

- **Communicate risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6)** - ensure safe and effective evidence-based healthcare advice is offered, using a CDSS or another clinical support system. Use negotiation skills when necessary to establish agreement with patients on appropriate course of action to take for level of care determined. Where possible assist patients in the correct use of primary care and emergency care services and other healthcare related organisations.
- **Support the safeguarding of individuals (SCDHSC0024)** following local protocols and standards. You will relate to others in ways which support rights, inclusion and wellbeing of individuals, supporting individuals to keep themselves safe.
- **Contribute to the effectiveness of teams (SCDHSC0241):** Work as part of a multi-disciplinary team, actively contributing to service improvements where appropriate. You will assist new members of staff, and provide appropriate clinical advice and support to colleagues on care practices, delivery and service development within your scope of practice. Provide cover for sickness, bank holidays, annual leave of other health advisors and work flexibly across sites as required by the service.

2.2 General Duties

- **Act within the limits of your competence and authority (GEN 63)**, i.e. work within the parameters of your own skills and knowledge, maintaining an awareness of service and practice developments. Adhere to all organisational procedures, protocols and other relevant memoranda as appropriate.

- **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. Adhere to health and safety policies and report incidents, risks, complaints and compliments identified through Datix or via line manager.
- **Comply with legal requirements for maintaining confidentiality (CHS169)** by maintaining strict confidentiality to all issues concerned with the service and adhere to requirements of the Data Protection Act 1984, Freedom of Information Act, Information Governance and Caldicott Principles.
- **Promote the rights and diversity of individuals (SCDHSC3111)** including promoting culture which values and respects the diversity of all individuals and their capacity to exercise their rights in the work setting.

2.3 People and Personal Development

- **Make use of supervision (GEN36)**, i.e. participate in regular supervision in line with local guidelines in order to continually improve your performance and gain support following difficult calls.
- **Develop your own knowledge and practice (SCDHSC0023)** - this includes reflecting on your practice, and taking opportunities to improve your practice and apply learning in the workplace. You will maintain professional and clinical competence through mechanisms of continuing professional development.
 - **Monitor your own work practices (GEN23)**. You will ensure you remain up to date with new information and system changes. You will attend meetings, mandatory training and system updates as requested by managers. You will participate in regular performance reviews with managers as appropriate to individual scope of practice.

- **Undertake coaching or mentoring (LSICM05)** and behave as a role model as appropriate in the development of health advisor and clinical triage consultation.
- **Provide supervision to other individuals (GEN35)** including peers, health advisors and service advisors to support their ongoing development.

2.4 Professional

- Maintain active registration with professional bodies such as NMC or HCPC.
- Work within your professional code of conduct.
- Successfully complete training on a CDSS and maintain competence in line with pre-defined competency framework.
- Maintain awareness of and work within the values of

3. Probationary periods

All staff new to the organisation are required to undertake CDSS training. Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Clinical Advisor

Requirements	Essential	Desirable	How identified
Qualifications	Registered nurse or mental health nurse (NMC) or registered paramedic (HCPC), pharmacist (HCPC) or physiotherapist (HCPC)	Recognised minor injuries certificate. Mentor/coaching qualification	Application Form Copies of Qualification Certificates
Experience	Significant post-registration training/consolidation and experience in at least 2 healthcare settings or specialities (one must be general adult care) Experience of working in a multi-professional/multiagency environment. Understanding of patient management in primary, secondary and tertiary care setting	Triage/telephone advice experience. Experience of working independently Experience of working in primary care Knowledge of local primary care services including key stakeholders	Application Form Interview References
Training	Commitment to continuous learning Proactively maintain knowledge of current developments in clinical practice		Application Form Interview
Practical / intellectual skills	Able to stay calm in the event of the unexpected and work under pressure Effective communication and negotiation skills Willingness to participate in service development Sound clinical decision-making capabilities – ability to demonstrate critical thinking Awareness of accountability in clinical practice Effective time management and able to prioritise work effectively Understanding of confidentiality issues and Data Protection Act Demonstrate interest in and ability to support, coach and mentor others Able to demonstrate initiative and motivation		Application Form Interview
Health	Able to fulfil the health requirements of the post as identified in the Job Description, taking into account any reasonable adjustments recommended by Occupational Health		Health at Work Form
General	Must be eligible to work in the UK Demonstrate ability to work in a team Ability to deal sensitively with distressing, emotional situations Commitment to role Able to work unsocial hours, including 24/7 shift work and bank holidays		Application Form Interview

job description

person specification

core competences

Clinical Advisor

1. Communication	Date achieved	Assessor signature
<p>Level 4 - Develop and maintain communication with people on complex matters, issues and ideas and/ or in complex situations. For example:</p>		
<ul style="list-style-type: none"> • Encourages effective communication between all involved 		
<ul style="list-style-type: none"> • Develops partnerships and actively maintains them 		
<ul style="list-style-type: none"> • Anticipates barriers to communication and takes action to improve communication 		
<ul style="list-style-type: none"> • Articulates a vision for trust focus which generates enthusiasm and commitment from both employees and patients/wider public 		
<ul style="list-style-type: none"> • Is persuasive in putting forward own view and that of the organisation 		
<ul style="list-style-type: none"> • Communicates effectively and calmly in difficult situations and with difficult people 		

Comments and Action Plan

Clinical Advisor

2. Personal and People Development	Date achieved	Assessor signature
<p>Level 4 - Develop oneself and others in areas of practice. For example:</p>		
<ul style="list-style-type: none"> • Contributes to development in the workplace as a learning environment 		
<ul style="list-style-type: none"> • Actively creates opportunities to enable everyone to learn from each other and from external good practice 		
<ul style="list-style-type: none"> • Uses a coaching approach to encourage others to develop 		
<ul style="list-style-type: none"> • Ensures all employees managed have annual appraisals and personal development plans in place and comply with mandatory training 		

Comments and Action Plan

Clinical Advisor

3. Health, Safety and Security	Date achieved	Assessor signature
Level 2 - Monitor and maintain health, safety and security of self and others		
<ul style="list-style-type: none"> Looks for potential risks to self and others in work activities and processes 		
<ul style="list-style-type: none"> Manages identified risk in the best way possible 		
<ul style="list-style-type: none"> Works in a way that complies with legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Takes action to manage an emergency, calling for help immediately when appropriate 		
<ul style="list-style-type: none"> Reports actual or potential problems that may put health, safety or security at risk and suggests solutions 		
<ul style="list-style-type: none"> Supports and challenges others in maintaining health, safety and security at work 		

Comments and Action Plan

Clinical Advisor

4. Service Improvement	Date achieved	Assessor signature
Level 1 - Make changes in own practice and offer suggestions for improving services. For example:		
<ul style="list-style-type: none"> • Discusses with line manager changes that might need making to own work practice and why 		
<ul style="list-style-type: none"> • Adapts own work and takes on new tasks as agreed and asks for help if needed 		
<ul style="list-style-type: none"> • Helps evaluate the service when asked to do so 		
<ul style="list-style-type: none"> • Passes on any good ideas to improve services to line manager or appropriate person 		
<ul style="list-style-type: none"> • Alerts manager if new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		
Level 2 - Contribute to the improvement of services:		
<ul style="list-style-type: none"> • Discusses with team the likely impact of changing policies, strategies and procedures on practice. Also, about changes the team can make and how to make them effective 		
<ul style="list-style-type: none"> • Takes on new work and make changes to own work when agreed, requesting relevant help if needed 		
<ul style="list-style-type: none"> • Supports colleagues in understanding and making agreed changes to their work 		
<ul style="list-style-type: none"> • Evaluates own and others' work when needed 		
<ul style="list-style-type: none"> • Make suggestions to improve the service 		
<ul style="list-style-type: none"> • Constructively identifies where new ways of working, policies or strategies are having a negative impact on the service given to users or the public 		

Comments and Action Plan

job description

person specification

core competences

Clinical Advisor

5. Quality	Date achieved	Assessor signature
<p>Level 3 - Contribute to improving quality. For example:</p>		
<ul style="list-style-type: none"> Promotes quality approaches making others aware of the impact of quality 		
<ul style="list-style-type: none"> Understands own role, its scope and how this may change and develop over time in developing a high quality organisation 		
<ul style="list-style-type: none"> Reviews effectiveness of own team and helps and enables others to work as a team 		
<ul style="list-style-type: none"> Prioritises own workload and manages own time in a manner that maintains and promotes high quality 		
<ul style="list-style-type: none"> Evaluates others work in own area and raises quality issues and related risks with the appropriate people 		
<ul style="list-style-type: none"> Supports changes in own area that improves the quality of systems and processes 		
<ul style="list-style-type: none"> Takes appropriate action when there is a persistent problem with quality 		

Comments and Action Plan

Clinical Advisor

6. Equality and Diversity	Date achieved	Assessor signature
<p>Level 2 - Support equality and value diversity. For example:</p> <ul style="list-style-type: none"> • Acts in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Treats everyone with dignity and respect allows others to express their views even when different from one's own 		
<ul style="list-style-type: none"> • Does not discriminate or offer a poor service because of others' differences or different viewpoints 		
<p>Level 3 - Promote equality and value diversity</p>		
<ul style="list-style-type: none"> • Interprets equality, diversity and rights in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Actively acts as a role model in own behaviour and fosters a non-discriminatory culture 		
<ul style="list-style-type: none"> • Promotes equality and diversity in own area and ensures policies are adhered to 		
<ul style="list-style-type: none"> • Manages people and applies internal processes in a fair and equal way 		

Comments and Action Plan

1. Receive Requests for Assistance, Treatment or Care (GEN58)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/415/>

Performance criteria	Date achieved	Assessor signature
1. Be able to explain clearly and calmly to the caller your own role and its scope		
2. Request clearly (explain if needed): <ul style="list-style-type: none"> • what information you need • the reasons why you need the information and why some questions are needed at the start of the call • with whom the information will be shared 		
3. Communicate with the individual in a sensitive and respectful manner which promotes confidence, reduces anxiety and maintains their privacy and dignity		
4. Communicate with the individual in a manner consistent with: <ul style="list-style-type: none"> • their level of understanding • their culture and background – use a translator if needed • their preferred ways of communicating • their need for reassurance and support • the circumstances in which they are making the request 		
5. Confirm the personal and contact details of the individual who requires assistance, treatment or care and, where appropriate, those for the person making the request on behalf of the individual		
6. Use the CDSS to obtain the presenting history, symptoms and other relevant information as fully, accurately and sequentially as the circumstances of the request permit		
7. Ensure that you have obtained the information required so that the individual receives appropriate advice, further assistance and treatment or care using the CDSS. Escalate as per local protocols and CDSS if indicated		
8. Take appropriate action based upon all information received and the disposition arrived at via CDSS		
9. Record, store and share, if appropriate, the information received, in line with patient confidentiality, data protection and other relevant legislation, protocols and guidelines		
10. Adhere to legislation, protocols and guidelines when giving advice to individuals		
11. Recognise when a request is outside your remit and advise the individual of an alternative service		
12. Recognise, using CDSS, when a request requires a direct referral on behalf of the patient or caller		
13. Recognise the boundary of your role and responsibility and the situations that are beyond your competence and authority and escalate to a more senior member of staff		

1. Receive Requests for Assistance, Treatment or Care (GEN58) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/415/>

Comments and Action Plan

2. Interact with Individuals using Telecommunication (GEN21.2012)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3380/>

Performance criteria	Date achieved	Assessor signature
1. Respond to individuals according to organisational policies, answering the call within agreed standard		
2. Identify any constraints on individuals and the circumstances in which the interaction is being made. Ensure the caller is with the patient		
3. Ensure you have recorded and checked the individual's demographic details at the start of the call		
4. Encourage individuals to identify symptoms and to focus on their requirements using CDSS and local protocols and take appropriate action to deal with it. Assess whether there is any risk or dangers facing the individual		
5. Provide suitable opportunities for individuals to sustain the interaction		
6. Encourage individuals to provide additional information on their situation or requirements		
7. Respond to individuals' immediate requirements at each stage during the interaction, guided by CDSS		
8. Provide suitable indications to reassure individuals of continued interest		
9. Identify any signs of increased stress during interactions and establish their significance		
10. Provide clear information on the requirement to end the interaction		
11. End interactions according to the guidelines and procedures of your organisation, ensuring standard information on what to do if symptoms worsen is given		
12. Identify situations where it would be dangerous or disadvantageous to the interest of the individual to terminate the interaction and follow local protocols to manage this		
13. Follow local protocols and CDSS to take the appropriate action to resolve dangerous situations		
14. Where you are providing a confidential service, ensure the anonymity of individuals, self, and colleagues is maintained, according to the procedures of the service		
15. Record details of interactions in the appropriate systems		

Comments and Action Plan

3. Communicate Effectively in a Healthcare Environment (GEN97)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3001/>

Performance criteria	Date achieved	Assessor signature
1. Acknowledge and respond to communication promptly		
2. Communicate clearly and coherently taking into account the needs of individuals (callers or colleagues)		
3. Select the most appropriate method of communication for the individuals (colleagues)		
4. Ensure that the environment for communication is as conducive as possible for effective communication		
5. Adapt your communication style to suit the situation		
6. Identify any communication barriers with individuals and take the appropriate action		
7. Clarify points and check that you and others understand what is being communicated		
8. Actively listen and respond appropriately to any questions and concerns raised during communications		
9. Establish lines of communication which enable you to communicate with individuals in other locations in times of need or emergency		
10. Maintain confidentiality of information where appropriate to do so		

Comments and Action Plan

4. Assess an Individual's Health Status (CHS39)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/221>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability and respond in a timely manner to meet individual's needs		
2. Check the individual's identity and confirm the valid consent of the individual or that of a relevant carer has been obtained		
3. Obtain and confirm past and current health history and details of signs/symptoms experienced from the individual and relevant carers, ensuring that ambiguous or unusual information is clarified		
4. Determine the clinical objectives and priorities for the assessment of the individual's health status		
5. Agree the purpose, nature and timing of assessment with the individual and all relevant people in line with organisational procedures		
6. Establish and confirm the roles and responsibilities of practitioners who will be involved in the assessment		
7. Use appropriate communication methods [for remote assessment] to explain the nature, purpose and process of the assessment and share information in accordance with information governance		
8. Respect the individual's rights and wishes relating to their consent, privacy, beliefs and dignity		
9. Identify potential contra-indications or risks associated with the proposed assessment and associated options for risk management		
10. If validating a call, clarify patient's responses to previous questions and review current symptoms		
11. Use appropriate probing, and active listening to effectively assess the patient's symptoms		
12. Encourage the individual (or relevant carer's) full participation in the assessment and provide reassurance concerning their concerns or anxieties		
13. Ask relevant questions to obtain information to support the assessment		
14. Conduct and interpret remote [telephone] clinical assessment supported by a CDSS		
15. Determine the nature, severity and current status of the presenting condition (declared symptoms) and decide on appropriate action		
16. Make a full, accurate record of the information using a CDSS and local systems		
17. Confirm next action with patient and/or carer		
18. Make onward referrals to other services/practitioners where required, providing full and accurate information as required and/or provide appropriate home management advice to patient		

4. Assess an Individual's Health Status (CHS39) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/221>

Comments and Action Plan

5. Retrieve and reconcile information about an individual’s medication (PHARM29.2016)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/4218/>

Performance criteria	Date achieved	Assessor signature
1. Work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence		
2. Ensure that the environment and timing is suitable for open and confidential discussion with the individual or third party about their medicines		
3. Communicate with the individual and key people at a pace, in a manner and at a level appropriate to the individual’s understanding, preferences and needs		
4. Explain your role and responsibilities, introduce yourself and check the individual’s identity according to local guidelines before retrieving an individual’s medication history relevant to your work area		
5. Obtain valid consent from the individual or third party in accordance with Standard Operating Procedures		
6. Check the individual’s or third party understanding of the purpose of retrieving an individual’s relevant history		
7. Check and record the individual’s allergy status		
8. Use appropriate questions to explore, clarify and confirm any unusual or ambiguous information and record the information clearly and accurately in a systematic manner		
9. Identify and document the medicines and other substances, and ascertain from appropriate sources when and how they are taken by the individual		
10. Use appropriate sources to identify details that are relevant to the individual’s medication history including: <ul style="list-style-type: none"> • medicines that have been started recently • medicines that have stopped • medicines that have changed • medicines that are used regularly • medicines that are used occasionally • medicines that are swapped or shared between individuals or their family and friends • medicines that are bought from other sources • if the individual drinks alcohol, smokes or uses other substances • if the individual has experienced any problems or difficulties with their medication 		

5. Retrieve and reconcile information about an individual’s medication (PHARM29.2016) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/4218/>

Performance criteria	Date achieved	Assessor signature
11. Report any problems, inconsistencies or adverse reactions that the individual may have experienced from their medication in line with Standard Operating Procedures		
12. Reconcile and compare the medication history to the individual’s current list of medicines		
13. Identify and document any discrepancies, changes, deletions or additions		
14. Complete all relevant documentation and store appropriately in accordance with legal and organisational requirements		

Comments and Action Plan

6. Communicate the Risks to Health, Wellbeing and Safety to a Range of Individuals and Advise how the Risks Can Be Prevented, Reduced or Controlled (HP6)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2642/>

Performance criteria	Date achieved	Assessor signature
1. Keep up to date about hazards and risks by using reliable sources of expertise and information (for example TOXBASE), to enable you to provide accurate advice and information on anticipated risks		
2. Communicate with individuals in a vocabulary, manner and pace that is appropriate to them		
3. Where individuals are seeking advice in relation to risks, gather information from them guided by a CDSS and other sources such as TOXBASE and NHS Choices to enable you to make a realistic assessment of: <ul style="list-style-type: none"> • their perception of the risks • the actual risks in the situation 		
4. Where necessary, consult with colleagues, or access expert information in other ways, to make an accurate assessment of the situation and the risks involved, and to give appropriate advice. Escalate the call if outside your scope		
5. Provide information and advice, guided by a CDSS and protocols to enable individuals to reach a better understanding of the situation and the likely risks within it		
6. Provide advice on courses of action the individuals should take, where appropriate, based on the disposition identified from a CDSS and local protocols to assess the priorities in the situation, such as: <ul style="list-style-type: none"> • contact other agencies, urgently or routinely • take preventive measures • be reassured that the risks are slight 		
7. Record the information and advice you have given clearly and accurately		

Comments and Action Plan

7. Support the Safeguarding of Individuals (SCDHSC0024)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
i) Maintain your understanding and awareness of harm, abuse and safeguarding:		
1. Demonstrate understanding of factors, situations and actions that may cause or lead to harm and abuse		
2. Demonstrate understanding of signs and symptoms picked up in a telephone triage that may indicate that an individual has been, or is in danger of being, harmed or abused		
3. Demonstrate understanding of local procedures and your own accountability where there are concerns that an individual has been, or is in danger of being, harmed or abused		
4. Demonstrate understanding of the role of different agencies and the need for multi-agency working in safeguarding		
5. Demonstrate understanding of the actions you need to take when harm or abuse is suspected or has been disclosed, in line with local procedures and the responsibilities and boundaries of your role		
6. Demonstrate understanding of actions you must take and those you must avoid in order to protect the integrity of telephone evidence relating to possible harm or abuse		
7. Reflect on your own behaviour and values to ensure that they do not contribute to situations, actions or behaviour that may be harmful or abusive		
ii) Support practices that help to safeguard individuals from harm or abuse:		
1. Respond to individuals according to organisational policies, recognise actions, behaviours and situations that may lead to harm or abuse		
2. Recognise signs from verbal communication that may indicate an individual has been, or is in danger of being, harmed or abused		
3. Report, in accordance with work setting requirements, any changes, events or occurrences that cause you concern about the welfare of an individual		
4. Seek support in situations beyond your experience or expertise		
5. Use supervision and support to deal with your own reactions to possible harm or abuse, within confidentiality requirements		

7. Support the Safeguarding of Individuals (SCDHSC0024) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
iii) Work in ways that support the rights, inclusion and wellbeing of individuals:		
1. Ask the individual about their preferences		
2. Ensure your own actions support the individual in person centred ways		
3. Ensure your own actions respect the individual's dignity, privacy, beliefs, preferences, culture, values and rights		
4. Ensure your own actions support the individual's self-esteem, sense of security and belonging		
5. Ensure your own actions support the individual's active participation, independence and responsibility		
6. Ensure your own actions support equity and inclusion and do not discriminate		
7. Take appropriate steps where the behaviour and actions of others do not support the rights, inclusion and wellbeing of the individual (i.e. refer to line manager)		

Comments and Action Plan

8. Contribute to the Effectiveness of Teams (SCDHSC0241)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
i) Agree your role and responsibilities within the team:		
1. Access information about the team, its objectives and its purpose		
2. Ensure you understand the information about the team, its objectives and its purpose		
3. Work with other team members to ensure you understand your role and responsibilities and how they contribute to the overall objectives and purpose of the team		
4. Work with other team members to understand their roles and responsibilities		
5. Work with other team members to clarify how you can and should contribute to team activities, objectives and purposes		
ii) Participate effectively as a team member:		
1. Carry out your agreed role and responsibilities within the team		
2. Inform other members of the team about your activities		
3. Ensure your behaviour towards other team members helps the team to function effectively		
4. Complete your commitments to other team members effectively and according to overall work priorities		
5. Where you cannot complete any commitments within timescales specified, immediately inform appropriate team members		
6. Respond to differences of opinion constructively and in ways which respect other team members' points of view		
7. Where you experience problems in working effectively with other team members, seek appropriate advice and guidance		

8. Contribute to the Effectiveness of Teams (SCDHSC0241) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
iii) Contribute to improving the team's effectiveness:		
1. Offer supportive and constructive assistance to team members		
2. Offer suggestions, ideas and information that will benefit team members and improve team working		
3. Invite feedback from others about how you carry out your role in the team		
4. Use suggestions and information from others (e.g. call audits and quality target information) to improve your practice as a team member		
5. Take responsibility for agreeing and undertaking any development and learning that will enable you to carry out your role and responsibilities within the team more effectively		

Comments and Action Plan

9. Act Within the Limits of Your Competence and Authority (GEN63)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/85/>

Performance criteria	Date achieved	Assessor signature
1. Adhere to legislation, protocols (e.g. CDSS) and guidelines relevant to your role and field of practice		
2. Work within organisational systems and requirements as appropriate to your role		
3. Recognise the boundary of your role and responsibility and seek supervision where situations are beyond your competence and authority		
4. Maintain competence within your role and field of practice		
5. Use relevant research based protocols and guidelines as evidence to inform your practice		
6. Promote and demonstrate good practice as an individual and as a team member at all times		
7. Identify and manage potential and actual risks to the quality and safety of practice		
8. Evaluate and reflect on the quality of your work and make continuing improvements		

Comments and Action Plan

10. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
i) Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
ii) Reduce the risks to health and safety at work:		
1. Control those health and safety risks within your capability and job responsibilities		
2. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
3. Pass on suggestions for reducing risks to health and safety to the responsible people		
4. Make sure your behaviour does not endanger the health and safety of you or others at work, e.g. ensure your workspace and headset are cleaned regularly		
5. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
6. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
7. Make sure that your personal presentation and behaviour at work protects the health and safety of you and others meets any legal responsibilities, and is in accordance with workplace instructions		

Comments and Action Plan

11. Comply with Legal Requirements for Maintaining Confidentiality (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individual's needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local policies and protocols		

Comments and Action Plan

12. Promote the rights and diversity of individuals (SCDHSC3111)

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's capacity to exercise their rights and responsibilities		
1. Provide up to date information, appropriate explanations and support to enable the individual and key people to understand their rights and responsibilities		
2. Provide up to date information, appropriate explanations and support to enable the individual and key people to exercise their rights		
3. Work in ways that demonstrate to others how to respect and promote the views, choices and wishes of individuals and key people		
4. Work in ways that demonstrate to others how to promote active participation to maximise the individual's control over their own life		
5. Demonstrate through your practice how to promote the right of the individual to make informed choices and decisions about their life and well-being, and about taking and managing potential and actual risks		
6. Interpret the rights and responsibilities of the individual in a way that is consistent with the law, regulation and work setting requirements		
7. Provide up to date information, appropriate explanations and support to enable the individual and key people to acknowledge the complexities of decisions that may need to be made in order to balance their rights, preferences and responsibilities		
8. Seek assistance when conflicts arise that you cannot deal with		

12. Promote the rights and diversity of individuals (SCDHSC3111) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote a culture that values and respects diversity		
9. Work with the individual, key people and others to understand the cultural experience, background and beliefs of the individual		
10. Identify how and where to access expertise on specific cultures or aspects of culture		
11. Access expertise and advice from people, groups and networks to enhance your understanding of the individual's culture, background and beliefs		
12. Work with the individual, key people and others to enhance aspects of the environment, practice and behaviour that are beneficial to an inclusive culture		
13. Work with the individual, key people and others to address aspects of the environment, practice and behaviour that may create barriers to an inclusive culture		
14. Ensure that activities and practices use the individual's culture and life experiences as a resource		
15. Support the individual to consider how they may wish to build upon their cultural experience in ways that promote participation, inclusivity and co-operation with others		
16. Demonstrate through your practice how to support the individual's right to communicate using their preferred language and method		
17. Model behaviour that encourages others to work in ways that promote equality and respect diversity		
18. Challenge practices and processes that prevent the individual having equal opportunity to services, support and facilities		
19. Seek assistance when you are having difficulty promoting equality and diversity		

12. Promote the rights and diversity of individuals (SCDHSC3111) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's rights in relation to information about themselves		
20. Work in ways that demonstrate to others how to support the right of the individual to access information about themselves		
21. Disclose information about the individual only to those who have the right and need to know, and once proof of identity has been obtained		
22. Encourage others to disclose information only to those who have the right and need to know, and once proof of identity has been obtained		
23. Ensure that records and reports about work with the individual are completed within confidentiality agreements and according to legal and work setting requirements		
24. Maintain confidentiality when storing and accessing information about the individual		
25. Work in ways that demonstrate to colleagues how to respect and protect the privacy of the individual when handling information about them		
Promote confidence that the rights of individuals will be upheld in the work setting		
26. Ensure your own practice is always consistent with the law, regulation and work setting requirements		
27. Support others to work within the law, regulation and work setting requirements		
28. Use sensitively and responsibly the influence that accompanies your job role and responsibilities		
29. Support others to use their influence sensitively and responsibly		
30. Work in ways that demonstrate you are honest, trustworthy, reliable and dependable at all times		
31. Encourage others to be honest, trustworthy, reliable and dependable in their work		
32. Work with others to ensure all communication is appropriate, open, accurate and straightforward		
33. Ensure that you honour your work commitments and support colleagues to do the same		
34. Ensure that you and others declare any personal interests that might influence judgements and practice		
35. Work in ways that demonstrate to others how to support the right of the individual to compliment, comment and complain about services they are receiving and to have any comments and complaints taken seriously		

12. Promote the rights and diversity of individuals (SCDHSC3111) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Comments and Action Plan

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13. Make Use of Supervision (GEN36)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Performance criteria	Date achieved	Assessor signature
1. With your line manager identify the nature of the supervision you require and consider any possible changes to the current supervision		
2. In conjunction with your line manager, select a qualified supervisor in the organisation to best meet your needs		
3. Agree the frequency of supervision necessary for safe, effective practice with your line manager and supervisor		
4. Clarify and agree with your supervisor: <ul style="list-style-type: none"> • roles • joint responsibilities • commitments • aims and objectives • ways of working • arrangements for monitoring and reviewing the supervision • the timing and process of changing or ending the supervisory relationship 		
5. Recognise appropriate cases and aspects of your work which require attention in supervision		
6. Bring mistakes and difficult moments in call handling to supervision		
7. Manage and use the anxieties around supervision to engage in non-defensive reflection, during and following, supervision		
8. Develop the ability to question and challenge your supervisor and use this as a tool for your own development		
9. Use your reflections on the supervisory relationship in supervision and to inform aspects of your work with individuals		
10. With your supervisor and/or line manager review the process, outcomes and continuing effectiveness of supervision against the aims and objectives		
11. identify unresolved issues, future supervision requirements and ways of achieving these in discussion with your line manager		

13. Make Use of Supervision (GEN36) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Comments and Action Plan

14. Develop your Own Knowledge and Practice (SCDHSC0023)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Performance criteria	Date achieved	Assessor signature
i) Reflect on your current practice		
1. Clarify with others (e.g. line manager, mentor/clinical supervisor) the skills, knowledge and values required to carry out your job role		
2. Clarify with others (using clinical supervision, appraisal and teaching sessions) the areas of your work where literacy, numeracy and information technology skills are necessary		
3. Actively seek feedback from your line manager, mentor and/or clinical supervisor on your use of skills, knowledge and values in your practice		
4. Agree with others the areas of strength in your practice		
5. Reflect with others on the way your values, personal beliefs and experiences may affect your work with individuals		
ii) Plan to develop your knowledge and practice		
1. Seek support from others to identify areas for development within your practice that would help you to carry out your work activities more effectively		
2. Seek advice on development opportunities to achieve development from your line manager, mentor or clinical supervisor		
3. Agree a personal development plan with your line manager and/or supervisor		
4. Secure opportunities for development with the help of your line manager or mentor		
iii) Apply acquired knowledge and skills in your work		
1. Use opportunities with others to reflect on your learning from development opportunities in order to continuously improve your practice		
2. Review how the newly acquired skills and knowledge can be applied in your practice		
3. Confirm with others that it is safe and within your job role before applying new skills and knowledge		
4. Apply new skills and knowledge that have been agreed as appropriate to your job role		
5. Evaluate with others how far your new skills and knowledge have enhanced your work		

14. Develop your Own Knowledge and Practice (SCDHSC0023) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0023.pdf>

Comments and Action Plan

15. Monitor Your Own Work Practices (GEN23)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2051/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability		
2. Allocate monitoring activities within your work at regular intervals consistent with legal, professional and organisational requirements		
3. Adjust the frequency of monitoring where necessary to ensure compliance with quality systems and whenever risks are identified		
4. Monitor your work activities and outcomes against the relevant quality indicators and standards		
5. Access information from appropriate sources, in conjunction with your team leader, as relevant to the monitoring activity and carry out all monitoring checks correctly and accurately		
6. Obtain the correct and complete data (with your team leader) relevant to the monitoring activity and correctly identify any non-compliance or variance in work activities and outcomes against relevant quality indicators		
7. Report instances of non-compliance or variance with quality standards accurately and promptly to relevant people		
8. Use the monitoring results to improve your working practices and outcomes and access appropriate support to improve your practice where required (i.e. coaching or clinical supervision)		
9. Act on any recommendations to improve performance and quality outcomes, making use of supervision, coaching and additional training		
10. Review any changes to working practices as required to confirm and sustain improvements		
11. Maintain clear, accurate and complete records of your monitoring activities and outcomes in line with current legislation, guidelines, local policy and protocols		

Comments and Action Plan

16. Undertake Coaching or Mentoring (LSICM05)

<https://tools.skillsforhealth.org.uk/external/LSICM05.pdf>

Performance criteria	Date achieved	Assessor signature
1. Plan coaching or mentoring objectives and goals with colleague to meet identified motivations, priorities and aspirations		
2. Agree approaches to deliver the planned objectives and goals		
3. Apply coaching or mentoring methods to achieve agreed objectives and goals		
4. Elicit motivation in colleague to work towards their objectives and goals		
5. Provide opportunities for colleague to review progress toward achievement of their goals		
6. Check with your colleagues that the coaching or mentoring has met their needs and expectations		
7. Take timely action to support colleagues who may not be achieving their objectives and goals		
8. Enable colleague to take responsibility for their objectives and goals		
9. Review the coaching or mentoring agreement and reflect on progress toward objectives and goals with your colleague		
10. Enable colleague to revise objectives, modify goals and plan new ones based on their progress		
11. Confirm with colleague the course of action and methods to achieve outstanding goals, modified goals or newly identified goals		
12. Agree and record the interactions, outcomes and progress towards objectives and goals with colleague in accordance with organisational requirements		

Comments and Action Plan

17. Provide Supervision to Other Individuals (GEN35)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2295/>

Performance criteria	Date achieved	Assessor signature
1. Agree with supervisee the type, frequency and purpose of routine contact and how to contact you if they need additional discussion, advice or supervision		
2. Agree with supervisee the confidential nature of the supervision relationship		
3. Maintain contact with supervisee to provide opportunities for feedback, discussion and support		
4. Carry out supervision as agreed (frequency and type)		
5. Enable supervisee to reflect on and make decisions about levels of contact		
6. Enable supervisee to reflect on and make decisions about the objectives and outcomes of their work		
7. Enable supervisee to identify their roles and responsibilities in carrying out their work and to identify the limits of their current competence		
8. Enable supervisee to reflect on and make decisions on how their work relates to evidence based practice		
9. Enable supervisee to reflect on and make decisions on the need for intervention by other specialist workers and agencies		
10. Actively monitor that professional and behavioural boundaries are clear and are being observed by the supervisee in work relationships		
11. Challenge appropriately those individuals who show signs of becoming complacent with the progress of their work and re-emphasise responsibilities and accountabilities at work		
12. Offer supervisee appropriate support to manage their work effectively		
13. Supervise individuals at a sufficient level to ensure they only undertake activities for which they are competent and within their remit		
14. Actively monitor the effect which undertaking different activities has on individuals and take appropriate action where there are concerns that it is detrimental to their health or social wellbeing		

Comments and Action Plan

Senior Clinical Advisor/Clinical Lead

Job description	
Post title:	Senior Clinical Advisor/Clinical Lead
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 6
Location:	

1. The Post

1.1 Post Description

Senior Clinical Advisor/Clinical Leads (level 6) require a critical understanding of detailed theoretical and practical knowledge and have specialist knowledge and experience and/or have management and leadership responsibilities. They have some responsibility for team performance and service development and they consistently undertake self-development.

They have a depth of knowledge and understanding which enables them to perform at a high level of practice, take a leadership role, use and develop evidence to inform their practice and deal with complex, unpredictable environments. (www.skillsforhealth.org.uk)

You will be responsible for the telephone assessment of health and clinical needs, utilising professional clinical judgement, supported by decision-support

software. This requires generalist and specialist skills to assess and deliver care to patients across all age-groups in a contact centre.

You will provide assessment, medication advice and health information supporting individuals to access the appropriate level of care including advice to manage their symptoms at home.

You will be responsible for the supervision, teaching, precepting and mentoring of other staff which may include students, other clinicians and health advisors.

You will be expected to support delivery of the national healthcare agenda, and represent the organisation in a timely and professional manner as and when required.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.ukstandards.org.uk), which can be used as evidence towards educational awards.

2.1 Call Handling (clinical)

- **Assess an individual's health status [remotely] (CHS39).**
You will provide skilled and effective assessment of patients presenting clinical need, through telephone consultation, using professional clinical judgement with the support of clinically based algorithms. You will utilise advanced listening, probing and facilitative skills across a diverse range of calls, some of which are highly challenging because of emotive circumstances or caller aggression. This may need you to **retrieve and reconcile information about an individual's medication (PHARM29.2016)** escalating appropriately as necessary.
- **Communicate risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6).** You will apply critical analysis to the synthesis of complex information during the care process to provide accurate advice and health information to patients in order to empower them to act upon the advice given. You will recognise the opportunity for and provide health education to patients during the consultation process, referring to appropriate health care professionals as required.
 - **Manage an individual's medication to achieve optimum outcomes (CHS74)** supported by CDSS and within the scope of PGD, escalating when appropriate.
 - **Communicate effectively in a healthcare environment (GEN97),** liaising effectively between caller and third party in critical situations/areas of

concern, e.g. safeguarding where information is not consistent or may be disputed. You will use complex communication skills to negotiate (utilising translation services in situations where language barriers are present), and provide support to callers who may not agree with recommended outcomes, and may be emotional, hostile or antagonistic.

- **Support the safeguarding of individuals (SCDHSC0024),** utilising acquired skills in mental health, child protection, medication and other areas of healthcare as required for the role, ensuring policies and legislation are followed.

2.2 Leadership

- **Develop and sustain productive working relationships with colleagues (CFAM&LDD1)** in order to provide clinical support to health advisors, senior health advisors, clinical advisors and dental nurses on shift, ensuring safe effective working. You will actively communicate with all senior managers of any factors affecting the service delivery at the time an issue is highlighted. You will act as a professional role model at all times.
- **Contribute to the effectiveness of teams (SCDHSC0241),** using knowledge and experience to support other front-line staff, including fellow clinical advisors and health advisors, in making decisions relating to patient care leading to safe service user outcomes. You will attend and contribute to meetings and specialist interest groups locally and nationally. You will work with the service delivery team to contribute to the development and delivery of the service and facilitate and actively participate in the continuous quality improvement (CQI) audit process to develop individual performance and achieve set targets.
- **Provide leadership in your area of responsibility (CFAM&LBA2),** providing clinical leadership and motivating and supporting colleagues to maintain and improve their performance.

- **Promote the rights and diversity of individuals (SCDHSC311).** This includes promoting the capacity of individuals to exercise their rights and responsibilities and promoting a culture which values and respects the diversity of all individuals. It also addresses individuals' rights in relation to information about themselves and the need to promote confidence in individuals that their rights will be upheld in the work setting.

2.3 Personal and People Development

- **Undertake coaching or mentoring (LSICM05)** and training with staff of all grades and students in relation to clinical practice generally, as well as your own specialism, to maintain an up-to-date knowledge of current practice. Share and utilise areas of specialist practice or special interest with peers and colleagues to inform patient care.
- **Provide (clinical) supervision to other individuals (GEN 35)** including peers, health advisors and service advisors to support their ongoing development.
- **Make use of supervision (GEN36),** i.e. participate in regular clinical and operational supervision in line with local guidelines in order to continually improve your performance and facilitate ongoing development.

2.4 General Duties

- **Act within the limits of your competence and authority (GEN63),** working within the parameters of your own skills and knowledge and maintaining responsibility for your own personal development.
 - **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. You

will adhere to health and safety policies and report incidents and risks identified through Datix or via line manager.

- **Comply with legal requirements for maintaining confidentiality (CHS169)** by maintaining strict confidentiality to all issues concerned with the service and adhere to requirements of the Data Protection Act 1984, information governance and Caldicott Principles. You will keep immediate and accurate records of patient user enquiries during the consultation.

2.5 Managing Self

- **Manage and organise your own time and activities (HT4),** actively working independently, and being accountable and responsible for managing your own approach to workload, risk assessment and risk management.

2.6 Professional

- **Develop and maintain your professional networks (CFAM&LAA3)** to ensure you work within and promote the regulatory requirements, codes and guidance defined by the appropriate regulatory body, e.g. NMC or HCPC. You will develop and maintain your own expertise, practice and competence in the role, and promote the organisation's vision and values.
- **Monitor your own work practices (GEN23)** to ensure you maintain your own competence through CPD and seek feedback on your own performance from direct reports and line manager. You will maintain personal responsibility and accountability for your own ongoing active professional registration and fitness to practice. You will participate in regular performance reviews with your line manager. You will identify and use information sources to support and underpin clinical decision-making.

3. Probationary periods

All staff new to the organisation are required to undertake the relevant clinical decision support system. Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Senior Clinical Advisor/Clinical Lead

Requirements	Essential	Desirable	How identified
Qualifications	Registered with the appropriate regulatory body, eg as a Registered General Nurse, Mental Health Nurse, Learning Disabilities Nurse, Children’s Nurse, Midwife, Paramedic, Physiotherapist, Dentist or Pharmacist Educated to degree level or equivalent.	Supervision/mentoring training or qualification Leadership/management training or qualification	Application Form Copies of Qualification Certificates
Experience	Substantial clinical experience in a range of settings. In-depth knowledge of a specialist clinical area Previous experience working within IUC / NHS 111 as clinical advisor or health advisor. Previous experience in leadership – including engaging and motivating staff Experience of working in a multi-professional/multi-agency environment Experience of coaching and mentoring others.	Previous experience of supporting or managing change	Application Form Interview References
Training	Willing and able to participate in CDSS training if required Commitment to Continuous Professional Development (CPD) and lifelong learning	Knowledge of the client group and evidence of related training Previous competency-based training in relevant field. IT experience with word processing, spreadsheets and other packages.	Application Form Interview
Practical / intellectual skills	Ability to engage with people and motivate and support them to work to high standards Calm under pressure, able to use initiative and make decisions Excellent interpersonal/communication skills with a variety of media and with all levels of staff High level of clinical reasoning skills Ability to problem solve Ability to take responsibility for managing individual team members according to local policies and procedures Ability to contribute to and manage change Organised with effective time management Adaptable and self-motivated		Application Form Interview
Job circumstances	Commitment to role Ability to work unsocial hours Flexibility to meet service /rota needs Ability to travel to all sites on request and external meeting locations on request		Health at Work Form
General	Must be eligible to work in the UK Demonstrate ability to work in a team Ability to deal sensitively with distressing, emotional situations Conscientious, reliable and resourceful Professional attitude to employment Self-starter		Application Form Interview

Senior Clinical Advisor/Clinical Lead

1. Communication	Date achieved	Assessor signature
<p>Level 4 - Develop and maintain communication with people on complex matters, issues and ideas and/or in complex situations. For example:</p>		
<ul style="list-style-type: none"> • Encourages effective communication between all involved 		
<ul style="list-style-type: none"> • Develops partnerships and actively maintains them 		
<ul style="list-style-type: none"> • Anticipates barriers to communication and takes action to improve communication 		
<ul style="list-style-type: none"> • Articulates a vision for trust focus which generates enthusiasm and commitment from both employees and patients/wider public 		
<ul style="list-style-type: none"> • Is persuasive in putting forward own view and that of the organisation 		
<ul style="list-style-type: none"> • Communicates effectively and calmly in difficult situations and with difficult people 		

Comments and Action Plan

Senior Clinical Advisor/Clinical Lead

2. Personal and People Development	Date achieved	Assessor signature
<p>Level 4 - Develop oneself and others in areas of practice. For example:</p>		
<ul style="list-style-type: none"> • Contributes to development in the workplace as a learning environment 		
<ul style="list-style-type: none"> • Actively creates opportunities to enable everyone to learn from each other and from external good practice 		
<ul style="list-style-type: none"> • Uses a coaching approach to encourage others to develop 		
<ul style="list-style-type: none"> • Ensures all employees managed have annual appraisals and personal development plans in place and comply with mandatory training 		

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Senior Clinical Advisor/Clinical Lead

3. Health, Safety and Security	Date achieved	Assessor signature
<p>Level 3 - Promote, monitor and maintain best practice in health, safety and security. For example:</p>		
<ul style="list-style-type: none"> Identifies and manages risk at work and helps others to do the same 		
<ul style="list-style-type: none"> Makes sure others work in a way that complies with legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Carries out, or makes sure others carry out risk assessments in own area. Checks work area to make sure it is free from risks and conforms to legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Takes the right action when risk is identified 		
<ul style="list-style-type: none"> Finds ways of improving health, safety and security in own area 		

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Senior Clinical Advisor/Clinical Lead

4. Service Improvement	Date achieved	Assessor signature
<p>Level 3 - Appraise, interpret and apply suggestions, recommendations and directives to improve services. For example:</p>		
<ul style="list-style-type: none"> Identifies and evaluates potential improvements to the service 		
<ul style="list-style-type: none"> Discusses improvement ideas with appropriate people and agrees a prioritised plan of implementation to take forward agreed improvements 		
<ul style="list-style-type: none"> Presents a positive role model in times of service improvement 		
<ul style="list-style-type: none"> Supports and works with others to help them understand the need for change and to adapt to it 		
<ul style="list-style-type: none"> Enables and encourages others to suggest change, challenge tradition and share good practice with other areas of the organisation 		
<ul style="list-style-type: none"> Evaluates the changes made and suggests further improvements where needed 		
<ul style="list-style-type: none"> Evaluates draft policies and strategies and feeds back thoughts on impacts on users and the public 		

Comments and Action Plan

Senior Clinical Advisor/Clinical Lead

5. Quality	Date achieved	Assessor signature
<p>Level 3 - Contribute to improving quality examples. For example:</p>		
<ul style="list-style-type: none"> Promotes quality approaches making others aware of the impact of quality 		
<ul style="list-style-type: none"> Understands own role, its scope and how this may change and develop over time in developing a high quality organisation 		
<ul style="list-style-type: none"> Reviews effectiveness of own team and helps and enables others to work as a team 		
<ul style="list-style-type: none"> Prioritises own workload and manages own time in a manner that maintains and promotes high quality 		
<ul style="list-style-type: none"> Evaluates others work in own area and raises quality issues and related risks with the appropriate people 		
<ul style="list-style-type: none"> Supports changes in own area that improves the quality of systems and processes 		
<ul style="list-style-type: none"> Takes appropriate action when there is a persistent problem with quality 		

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Senior Clinical Advisor/Clinical Lead

6. Equality and Diversity	Date achieved	Assessor signature
Level 3 - Promote equality and value diversity. For example:		
<ul style="list-style-type: none"> • Interprets equality, diversity and rights in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Actively acts as a role model in own behaviour and fosters a non-discriminatory culture 		
<ul style="list-style-type: none"> • Promotes equality and diversity in own area and ensures policies are adhered to 		
<ul style="list-style-type: none"> • Manages people and applies internal processes in a fair and equal way 		
Level 4 - Develop a culture that promotes equality and values diversity		
<ul style="list-style-type: none"> • Actively promotes equality and diversity 		
<ul style="list-style-type: none"> • Monitors and evaluates extent to which legislation and policies are applied 		
<ul style="list-style-type: none"> • Monitors and evaluates extent to which legislation and policies are applied 		
<ul style="list-style-type: none"> • Actively challenges unacceptable behaviour and discrimination 		
<ul style="list-style-type: none"> • Supports people who need assistance in exercising their rights 		

Comments and Action Plan

1. Assess an Individual's Health Status (CHS39)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/221/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability and respond in a timely manner to meet individual's needs		
2. Check the individual's identity and confirm the valid consent of the individual or that of a relevant carer has been obtained		
3. Obtain and confirm past and current health history and details of signs symptoms experienced from the individual and relevant carers, ensuring that ambiguous or unusual information is clarified		
4. Determine the clinical objectives and priorities for the assessment of the individual's health status		
5. Agree the purpose, nature and timing of assessment with the individual and all relevant people in line with organisational procedures		
6. Establish and confirm the roles and responsibilities of practitioners who will be involved in the assessment		
7. Use appropriate communication methods [for remote assessment] to explain the nature, purpose and process of the assessment and share information in accordance with information governance		
8. Respect the individual's rights and wishes relating to their consent, privacy, beliefs and dignity		
9. Identify potential contra-indications or risks associated with the proposed assessment and associated options for risk management		
10. If validating a call clarify patient's responses to previous questions and review current symptoms		
11. Use appropriate probing, and active listening to effectively assess the patient's symptoms		
12. Encourage the individual (or relevant carer's) full participation in the assessment and provide reassurance concerning their concerns or anxieties		
13. Ask relevant questions to obtain information to support the assessment		
14. Conduct and interpret remote [telephone] clinical assessment supported by a CDSS		
15. Determine the nature, severity and current status of the presenting condition (declared symptoms) and decide on appropriate action		
16. Make a full, accurate record of the information using a CDSS and local systems		
17. Confirm next action with patient and/or carer		
18. Make onward referrals to other services/practitioners where required providing full and accurate information as required and/or provide appropriate home management advice to patient		

1. Assess an Individual's Health Status (CHS39) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id221/>

Comments and Action Plan

2. Retrieve and reconcile information about an individual’s medication (PHARM29.2016)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/4218/>

Performance criteria	Date achieved	Assessor signature
1. Work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence		
2. Ensure that the environment and timing is suitable for open and confidential discussion with the individual or third party about their medicines		
3. Communicate with the individual and key people at a pace, in a manner and at a level appropriate to the individual’s understanding, preferences and needs		
4. Explain your role and responsibilities, introduce yourself and check the individual’s identity according to local guidelines before retrieving an individual’s medication history relevant to your work area		
5. Obtain valid consent from the individual or third party in accordance with Standard Operating Procedures		
6. Check the individual’s or third party understanding of the purpose of retrieving an individual’s relevant history		
7. Check and record the individual’s allergy status		
8. Use appropriate questions to explore, clarify and confirm any unusual or ambiguous information and record the information clearly and accurately in a systematic manner		
9. Identify and document the medicines and other substances, and ascertain from appropriate sources when and how they are taken by the individual		
10. Use appropriate sources to identify details that are relevant to the individual’s medication history including: <ul style="list-style-type: none"> • medicines that have been started recently • medicines that have stopped • medicines that have changed • medicines that are used regularly • medicines that are used occasionally • medicines that are swapped or shared between individuals or their family and friends • medicines that are bought from other sources • if the individual drinks alcohol, smokes or uses other substances • if the individual has experienced any problems or difficulties with their medication 		

2. Retrieve and reconcile information about an individual’s medication (PHARM29.2016) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/4218/>

Performance criteria	Date achieved	Assessor signature
11. Report any problems, inconsistencies or adverse reactions that the individual may have experienced from their medication in line with Standard Operating Procedures		
12. Reconcile and compare the medication history to the individual’s current list of medicines		
13. Identify and document any discrepancies, changes, deletions or additions		
14. Complete all relevant documentation and store appropriately in accordance with legal and organisational requirements		

Comments and Action Plan

3. Communicate the risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2642/>

Performance criteria	Date achieved	Assessor signature
1. Keep up to date about hazards and risks by using reliable sources of expertise and information (for example TOXBASE), to enable you to provide accurate advice and information on anticipated risks		
2. Communicate with individuals in a vocabulary, manner and pace that is appropriate to them		
3. Where individuals are seeking advice in relation to risks, gather information from them guided by CDSS and other sources such as TOXBASE and NHS Choices to enable you to make a realistic assessment of: <ul style="list-style-type: none"> • their perception of the risks • the actual risks in the situation 		
4. Where necessary, consult with colleagues, or access expert information in other ways, to make an accurate assessment of the situation and the risks involved, and to give appropriate advice. Escalate the call if outside your scope		
5. Provide information and advice, guided by CDSS and protocols to enable individuals to reach a better understanding of the situation and the likely risks within it		
6. Provide advice on courses of action the individuals should take, where appropriate, based on the disposition identified from CDSS and local protocols to assess the priorities in the situation, such as: <ul style="list-style-type: none"> • contact other agencies, urgently or routinely • take preventive measures • be reassured that the risks are slight 		
7. Record the information and advice you have given clearly and accurately		

Comments and Action Plan

4. Manage an individual's medication to achieve optimum outcomes (CHS74)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/1205/>

Performance criteria	Date achieved	Assessor signature
1. Confirm the individual's details and their medical diagnosis at the start of the consultation		
2. Create an environment suitable for open and confidential discussion with the individual and/or carer		
3. Obtain valid consent, written or verbal, according to protocol		
4. Check drug formulation does not contradict cultural and religious directives		
5. Confirm that relevant investigations have been performed and the results are available		
6. Confirm the medication currently being taken by or being given to an individual. where a current list of medications cannot be established, this needs to be documented		
7. Assess and interpret specified monitoring markers in accordance with your scope of practice		
8. Ask the individual to explain their experiences and any problems or difficulties with the medication regime		
9. Clarify the individual's perception of the optimum outcome and identify the level of compliance with their treatment plan		
10. Discuss with the individual their experiences and report adverse reactions according to protocol		
11. Review the effectiveness of the medication in meeting the objectives of the treatment plan and whether the medication is still required. If no longer required it must be discontinued		
12. Suggest modifications where appropriate and consistent with the individual's treatment plan to achieve optimum outcomes		
13. Explain the treatment and potential side effects and their management to the individual and/or carer and accurately answer any questions at a level and pace that is appropriate to their: <ul style="list-style-type: none"> • level of understanding • culture and background • preferred ways of communicating • needs 		
14. Check that the individual (and/or carer) understands the medication and monitoring regime and any potential side effects together with their management		
15. Ensure that the individual is given written information and instructions regarding their medication		
16. Support the individual to take their medication as prescribed		
17. Reaffirm the benefits of adhering to the medication regime and the potential consequences of non compliance on their health		

4. Manage an individual's medication to achieve optimum outcomes (CHS74) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/1205/>

Performance criteria	Date achieved	Assessor signature
18. Set further review dates, if required		
19. Refer if necessary to an appropriate person for further review		
20. Ensure that the individual has details of who to contact should they be concerned about their condition		
21. Maintain clear, accurate and legible records in accordance with organisational policies, your scope of responsibility and practice		

Comments and Action Plan

5. Communicate Effectively in a Healthcare Environment (GEN97)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3001/>

Performance criteria	Date achieved	Assessor signature
1. Acknowledge and respond to communication promptly		
2. Communicate clearly and coherently taking into account the needs of individuals		
3. Select the most appropriate method of communication for the individuals		
4. Ensure that the environment for communication is as conducive as possible for effective communication		
5. Adapt your communication style to suit the situation		
6. Identify any communication barriers with the individuals and take the appropriate action		
7. Clarify points and check that you and others understand what is being communicated		
8. Actively listen and respond appropriately to any questions and concerns raised during communications		
9. Establish lines of communication which enable you to communicate with individuals in other locations in times of need or emergency		
10. Maintain confidentiality of information where appropriate to do so		

Comments and Action Plan

6. Support the Safeguarding of Individuals (SCDHSC0024)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
i) Maintain your understanding and awareness of harm, abuse and safeguarding:		
1. Demonstrate understanding of factors, situations and actions that may cause or lead to harm and abuse		
2. Demonstrate understanding of signs and symptoms picked up in a telephone triage that may indicate that an individual has been, or is in danger of being, harmed or abused		
3. Demonstrate understanding of local procedures and your own accountability where there are concerns that an individual has been, or is in danger of being, harmed or abused		
4. Demonstrate understanding of the role of different agencies and the need for multi-agency working in safeguarding		
5. Demonstrate understanding of the actions you need to take when harm or abuse is suspected or has been disclosed, in line with local procedures and the responsibilities and boundaries of your role		
6. Demonstrate understanding of actions you must take and those you must avoid in order to protect the integrity of telephone evidence relating to possible harm or abuse		
7. Reflect on your own behaviour and values to ensure that they do not contribute to situations, actions or behaviour that may be harmful or abusive		
ii) Support practices that help to safeguard individuals from harm or abuse:		
1. Respond to individuals according to organisational policies. Recognise actions, behaviours and situations that may lead to harm or abuse		
2. Recognise signs from verbal communication that may indicate an individual has been, or is in danger of being, harmed or abused		
3. Report, in accordance with work setting requirements, any changes, events or occurrences that cause you concern about the welfare of an individual		
4. Seek support in situations beyond your experience or expertise		
5. Use supervision and support to deal with your own reactions to possible harm or abuse, within confidentiality requirements		

6. Support the Safeguarding of Individuals (SCDHSC0024) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
iii) Work in ways that support the rights, inclusion and wellbeing of individuals:		
1. Ask the individual about their preferences		
2. Ensure your own actions support the individual in person-centred ways		
3. Ensure your own actions respect the individual's dignity, privacy, beliefs, preferences, culture, values and rights		
4. Ensure your own actions support the individual's self-esteem, sense of security and belonging		
5. Ensure your own actions support the individual's active participation, independence and responsibility		
6. Ensure your own actions support equity and inclusion and do not discriminate		
7. Take appropriate steps where the behaviour and actions of others do not support the rights, inclusion and wellbeing of the individual (i.e. refer to line manager)		

Comments and Action Plan

7. Develop and Maintain Productive Working Relationships with Colleagues (CFAM&LDD1)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDD1>

Performance criteria	Date achieved	Assessor signature
1. Establish working relationships with relevant colleagues within your organisation		
2. Recognise and respect the roles, responsibilities, interests and concerns of colleagues		
3. Seek to create a climate of trust and mutual respect, particularly where you have no authority, or shared authority, over those you are working with		
4. Seek to understand difficult situations and issues from colleagues' perspectives and provide support, where necessary, to move things forward		
5. Provide colleagues with appropriate information to enable them to perform effectively		
6. Consult colleagues in relation to key decisions and activities and take account of their views		
7. Fulfil agreements made with colleagues and let them know		
8. Advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements		
9. Identify and resolve conflicts of interest and disagreements with colleagues in ways which minimise damage to work activities and to the individuals involved		
10. Monitor and review the effectiveness of working relationships with colleagues in order to identify areas for improvement		
11. Seek and provide feedback in order to improve your own and your colleagues' performance		

Comments and Action Plan

8. Contribute to the Effectiveness of Teams (SCDHSC0241)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
i) Agree your role and responsibilities within the team:		
1. Access information about the team, its objectives and its purpose		
2. Ensure you understand the information about the team, its objectives and its purpose		
3. Work with other team members to ensure you understand your role and responsibilities and how they contribute to the overall objectives and purpose of the team		
4. Work with other team members to understand their roles and responsibilities		
5. Work with other team members to clarify how you can and should contribute to team activities, objectives and purposes		
ii) Participate effectively as a team member:		
1. Carry out your agreed role and responsibilities within the team		
2. Inform other members of the team about your activities		
3. Ensure your behaviour towards other team members helps the team to function effectively		
4. Complete your commitments to other team members effectively and according to overall work priorities		
5. Where you cannot complete any commitments within timescales specified, immediately inform appropriate team members		
6. Respond to differences of opinion constructively and in ways which respect other team members' points of view		
7. Where you experience problems in working effectively with other team members, seek appropriate advice and guidance		

8. Contribute to the Effectiveness of Teams (SCDHSC0241) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
iii) Contribute to improving the team's effectiveness:		
1. Offer supportive and constructive assistance to team members		
2. Offer suggestions, ideas and information that will benefit team members and improve team working		
3. Invite feedback from others about how you carry out your role in the team		
4. Use suggestions and information from others (e.g. call audits and quality target information) to improve your practice as a team member		
5. Take responsibility for agreeing and undertaking any development and learning that will enable you to carry out your role and responsibilities within the team more effectively		

Comments and Action Plan

9. Provide Leadership in Your Area of Responsibility (CFAM&LBA2)

<https://tools.skillsforhealth.org.uk/external/CFAM&LBA2>

Performance criteria	Date achieved	Assessor signature
1. Engage people within your area of responsibility in defining its direction and committing their energies and expertise to achieving its results		
2. Clearly and enthusiastically communicate a vision and shared values of where your organisation is going		
3. Ensure people understand how the vision, objectives and operational plans for your area link to the vision and objectives of the overall organisation		
4. Steer your area successfully through difficulties and challenges		
5. Develop a range of leadership styles and apply them appropriately to people and situations		
6. Communicate regularly and effectively with all the people working within your area and show that you listen to what they say		
7. Encourage people to take responsibility for their own development		
8. Give people support and advice when they need it especially during periods of setback and change		
9. Motivate and support people to achieve their work and development objectives, and provide recognition when they are successful		
10. Empower people to develop their own ways of working and take their own decisions within agreed boundaries		
11. Encourage people to take the lead in their own areas of expertise and show willingness to follow this lead		
12. Win, through your performance and behaviour, the trust and support of people		

Comments and Action Plan

10. Promote the rights and diversity of individuals (SCDHSC311)

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's capacity to exercise their rights and responsibilities		
1. Provide up to date information, appropriate explanations and support to enable the individual and key people to understand their rights and responsibilities		
2. Provide up to date information, appropriate explanations and support to enable the individual and key people to exercise their rights		
3. Work in ways that demonstrate to others how to respect and promote the views, choices and wishes of individuals and key people		
4. Work in ways that demonstrate to others how to promote active participation to maximise the individual's control over their own life		
5. Demonstrate through your practice how to promote the right of the individual to make informed choices and decisions about their life and well-being, and about taking and managing potential and actual risks		
6. Interpret the rights and responsibilities of the individual in a way that is consistent with the law, regulation and work setting requirements		
7. Provide up to date information, appropriate explanations and support to enable the individual and key people to acknowledge the complexities of decisions that may need to be made in order to balance their rights, preferences and responsibilities		
8. Seek assistance when conflicts arise that you cannot deal with		

10. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote a culture that values and respects diversity		
9. Work with the individual, key people and others to understand the cultural experience, background and beliefs of the individual		
10. Identify how and where to access expertise on specific cultures or aspects of culture		
11. Access expertise and advice from people, groups and networks to enhance your understanding of the individual's culture, background and beliefs		
12. Work with the individual, key people and others to enhance aspects of the environment, practice and behaviour that are beneficial to an inclusive culture		
13. Work with the individual, key people and others to address aspects of the environment, practice and behaviour that may create barriers to an inclusive culture		
14. Ensure that activities and practices use the individual's culture and life experiences as a resource		
15. Support the individual to consider how they may wish to build upon their cultural experience in ways that promote participation, inclusivity and co-operation with others		
16. Demonstrate through your practice how to support the individual's right to communicate using their preferred language and method		
17. Model behaviour that encourages others to work in ways that promote equality and respect diversity		
18. Challenge practices and processes that prevent the individual having equal opportunity to services, support and facilities		
19. Seek assistance when you are having difficulty promoting equality and diversity		

10. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's rights in relation to information about themselves		
20. Work in ways that demonstrate to others how to support the right of the individual to access information about themselves		
21. Disclose information about the individual only to those who have the right and need to know, and once proof of identity has been obtained		
22. Encourage others to disclose information only to those who have the right and need to know, and once proof of identity has been obtained		
23. Ensure that records and reports about work with the individual are completed within confidentiality agreements and according to legal and work setting requirements		
24. Maintain confidentiality when storing and accessing information about the individual		
25. Work in ways that demonstrate to colleagues how to respect and protect the privacy of the individual when handling information about them		
Promote confidence that the rights of individuals will be upheld in the work setting		
26. Ensure your own practice is always consistent with the law, regulation and work setting requirements		
27. Support others to work within the law, regulation and work setting requirements		
28. Use sensitively and responsibly the influence that accompanies your job role and responsibilities		
29. Support others to use their influence sensitively and responsibly		
30. Work in ways that demonstrate you are honest, trustworthy, reliable and dependable at all times		
31. Encourage others to be honest, trustworthy, reliable and dependable in their work		
32. Work with others to ensure all communication is appropriate, open, accurate and straightforward		
33. Ensure that you honour your work commitments and support colleagues to do the same		
34. Ensure that you and others declare any personal interests that might influence judgements and practice		
35. Work in ways that demonstrate to others how to support the right of the individual to compliment, comment and complain about services they are receiving and to have any comments and complaints taken seriously		

10. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Comments and Action Plan

11. Undertake Coaching or Mentoring (LSICM05)

<https://tools.skillsforhealth.org.uk/external/LSICM05.pdf>

Performance criteria	Date achieved	Assessor signature
1. Plan coaching or mentoring objectives and goals with colleague to meet identified motivations, priorities and aspirations		
2. Agree approaches to deliver the planned objectives and goals		
3. Apply coaching or mentoring methods to achieve agreed objectives and goals		
4. Elicit motivation in colleague to work towards their objectives and goals		
5. Provide opportunities for colleague to review progress toward achievement of their goals		
6. Check with your colleagues that the coaching or mentoring has met their needs and expectations		
7. Take timely action to support colleagues who may not be achieving their objectives and goals		
8. Enable colleague to take responsibility for their objectives and goals		
9. Review the coaching or mentoring agreement and reflect on progress toward objectives and goals with your colleague		
10. Enable colleague to revise objectives, modify goals and plan new ones based on their progress		
11. Confirm with colleague the course of action and methods to achieve outstanding goals, modified goals or newly identified goals		
12. Agree and record the interactions, outcomes and progress towards objectives and goals with colleague in accordance with organisational requirements		

Comments and Action Plan

12. Provide (Clinical) Supervision to Other Individuals (GEN35)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2295/>

Performance criteria	Date achieved	Assessor signature
1. Agree with individuals the nature, frequency and purpose of routine contact and how to contact you if they are in need of additional discussion, advice or supervision		
2. Agree with individuals the confidential nature of the supervision relationship		
3. Maintain contact with individuals to provide opportunities for feedback, discussion and support		
4. Supervise individuals in the manner and at the frequency agreed with them		
5. Enable individuals to reflect on and make decisions about levels of contact		
6. Enable individuals to reflect on and make decisions about the objectives and outcomes of their work		
7. Enable individuals to identify their roles and responsibilities in carrying out their work		
8. Enable individuals to identify the limits of their current competence		
9. Enable individuals to reflect on and make decisions on how their work relates to evidence based practice		
10. Enable individuals to reflect on and make decisions on how their work relates to evidence based practice		
11. Actively monitor that professional and behavioural boundaries are clear and are being observed by individuals in their work relationships		
12. Challenge appropriately those individuals who show signs of becoming complacent with progress of their work and re-emphasise their responsibilities and accountabilities for that work		
13. Offer individuals appropriate support to manage their work effectively		
14. Supervise individuals at a sufficient level to ensure that they only undertake activities for which they are competent and which are within their remit		
15. Actively monitor the effect which undertaking different activities has on individuals and take appropriate action where there are concerns that is detrimental to their health or social wellbeing		

Comments and Action Plan

13. Make Use of Supervision (GEN36)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Performance criteria	Date achieved	Assessor signature
1. Identify the nature of supervision you require		
2. Assess the available supervision in relation to your identified needs		
3. Select a qualified supervisor to best meet your needs		
4. Identify the role and value of supervision as a key component in professional practice		
5. Seek the frequency of supervision necessary for safe, effective practice		
6. Clarify the context, accountability and arrangements for supervision, and explore the implications of these with your supervisor: <ul style="list-style-type: none"> • roles • joint responsibilities • commitments • aims and objectives • ways of working • arrangements for monitoring and reviewing the supervision • the timing and process of changing or ending the supervisory relationship 		
7. Negotiate a supervisory contract with your supervisor which: <ul style="list-style-type: none"> • meets the identified purposes of the supervision • identifies the content and agenda for each supervisory session with your supervisor 		
8. Recognise appropriate cases and aspects of your work which require attention in supervision		
9. Bring mistakes and difficult moments in therapeutic practice to supervision		
10. Manage and use the anxieties around supervision to engage in non-defensive reflection, during and following, supervision		
11. Develop the ability to question and challenge your supervisor and use this as a tool for your own development		
12. Use your reflections on the supervisory relationship in supervision and to inform aspects of your work with individuals		
13. Review the process, outcomes and continuing effectiveness of supervision against the aims and objectives		
14. Consider any possible changes to the current supervision		
15. Identify unresolved issues, future supervision requirements and ways of achieving these		

13. Make Use of Supervision (GEN36) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Comments and Action Plan

14. Act Within the Limits of Your Competence and Authority (GEN63)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/85/>

Performance criteria	Date achieved	Assessor signature
1. Adhere to legislation, protocols and guidelines relevant to your role and field of practice		
2. Work within organisational systems and requirements as appropriate to your role		
3. Recognise the boundary of your role and responsibility and seek supervision where situations are beyond your competence and authority		
4. Maintain competence within your role and field of practice		
5. Use relevant research-based protocols and guidelines as evidence to inform your practice		
6. Promote and demonstrate good practice as an individual and as a team member at all times		
7. Identify and manage potential and actual risks to the quality and safety of practice		
8. Evaluate and reflect on the quality of your work and make continuing improvements		

Comments and Action Plan

15. Make Sure Your Actions Reduce Risks to Health and Safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
i) Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
ii) Reduce the risks to health and safety at work:		
1. Control those health and safety risks within your capability and job responsibilities		
2. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
3. Pass on suggestions for reducing risks to health and safety to the responsible people		
4. Make sure your behaviour does not endanger the health and safety of you or others at work, e.g. ensure your workspace and headset are cleaned regularly		
5. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
6. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
7. Make sure that your personal presentation and behaviour at work protects the health and safety of you and others meets any legal responsibilities, and is in accordance with workplace instructions		

Comments and Action Plan

job description

person specification

core competences

16. Comply with Legal Requirements for Maintaining Confidentiality (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individual's needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individual's information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local policies and protocols		

Comments and Action Plan

17. Manage and Organise Your Own Work Practices (HT4)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2501/>

Performance criteria	Date achieved	Assessor signature
1. Agree with your manager and /or work team: <ul style="list-style-type: none"> • who you will be working with • when • where 		
2. Plan your work and time so that you can meet the commitments you have made with individuals and the requirements of your organisation		
3. Identify the risks of the work and how you can best manage the risks to prepare for your work commitments in advance		
4. Undertake your work to time as far as is possible to do so		
5. Learn from what happens and change your plans accordingly		
6. Seek help and support from your manager and /or work team when you have difficulties meeting your commitments		
7. Complete records of your work activities according to legal and organisational requirements		

Comments and Action Plan

18. Develop and Maintain Your Professional Networks (CFAM&LAA3)

<https://tools.skillsforhealth.org.uk/external/CFAM&LAA3>

Performance criteria	Date achieved	Assessor signature
1. Establish professional networks of contacts which meet your current and future needs for information and resources		
2. Ensure that key members of your professional networks have an accurate idea of your knowledge, skills and competence and are aware of the benefits of networking with you		
3. Establish boundaries of confidentiality between yourself and members of your professional networks		
4. Agree guidelines for exchanging information and resources, where necessary		
5. Develop your professional networks to reflect your changing interests and needs		
6. Use technology effectively to develop and maintain your professional networks		
7. Make active use of the information and resources gained through your professional networks		
8. Introduce people and organisations with common interests to each other		

Comments and Action Plan

19. Monitor Your Own Work Practices (GEN23)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2051/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability		
2. Allocate monitoring activities within your work at regular intervals consistent with legal, professional and organisational requirements		
3. Adjust the frequency of monitoring where necessary to ensure compliance with quality systems and whenever risks are identified		
4. Monitor your work activities and outcomes against the relevant quality indicators and standards		
5. Access information from appropriate sources, in conjunction with your team leader, as relevant to the monitoring activity and carry out all monitoring checks correctly and accurately		
6. Obtain the correct and complete data (with your team leader) relevant to the monitoring activity and correctly identify any non-compliance or variance in work activities and outcomes against relevant quality indicators		
7. Report instances of non-compliance or variance with quality standards accurately and promptly to relevant people		
8. Use the monitoring results to improve your working practices and outcomes and access appropriate support to improve your practice where required (i.e. coaching or clinical supervision)		
9. Act on any recommendations to improve performance and quality outcomes, making use of supervision, coaching and additional training		
10. Review any changes to working practices as required to confirm and sustain improvements		
11. Maintain clear, accurate and complete records of your monitoring activities and outcomes in line with current legislation, guidelines, local policy and protocols		

Comments and Action Plan

Urgent Care Practitioner

Job description	
Post title:	Urgent Care Practitioner
Post reference:	
Accountable to:	
Responsible / reporting to:	
Level of role:	Skills for Health level 6
Location:	

1. The Post

1.1 Post Description

Urgent Care Practitioners (level 6) will have a critical understanding of detailed theoretical and practical knowledge and have specialist knowledge and experience and/or have management and leadership responsibilities. They have some responsibility for team performance and service development and they consistently undertake self-development. They have a depth of knowledge and understanding which enables them to perform at a high level of practice, take a leadership role, use and develop evidence to inform their practice and deal with complex, unpredictable environments. (www.skillsforhealth.org.uk)

You will be responsible for the telephone assessment of health and clinical needs, utilising professional clinical judgement, supported by clinical decision support software. This requires generalist and

specialist skills to assess and deliver care to patients across all age groups in a contact centre.

You will provide assessment, medication advice and health information supporting individuals to access the appropriate level of care including advice to manage their symptoms at home.

You will also be responsible for providing face to face consultations for patients presenting with unscheduled primary care conditions and minor injuries and illness needs.

You will take responsibility for the assessment, treatment and discharge of patients under remote supervision from either an Advanced Clinical Practitioner or GP.

You will be responsible for the supervision, teaching, precepting and mentoring of other staff which may include students, other clinicians and health advisors.

You will be expected to support delivery of the national healthcare agenda, and represent the organisation in a timely and professional manner as and when required.

2. Main duties and responsibilities of the post

The numbers in brackets refer to National Occupational Standards (www.skillsforhealth.org.uk) and can be used as evidence towards educational awards.

2.1 Call handling (Clinical)

- **Assess an individual's health status [remotely] (CHS39).** Provide skilled and effective assessment of patients presenting clinical need, through telephone consultation, using professional clinical judgement with the support of clinically based algorithms. Utilise advanced listening, probing and facilitative skills across a diverse range of calls, some of which are highly challenging due to emotive circumstances or caller aggression. This may need you to **retrieve and reconcile information about an individual's medication (PHARM29.2016)** escalating appropriately as necessary.
- **Communicate risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6).** Apply critical analysis to the synthesis of complex information during the care process to provide accurate advice and health information to patients in order to empower them to act upon the advice given.
Recognise the opportunity for and provide health education to patients during the consultation process, referring to appropriate health care professionals as required.
 - **Communicate effectively in a healthcare environment (GEN97)** liaising effectively between caller and third party in critical situations/areas of concern e.g. safeguarding where information is not consistent or may be disputed. Use complex communication skills to negotiate (utilising translation services in

situations where language barriers are present), and provide support to callers who may not agree with recommended outcomes, and may be emotive, hostile or antagonistic.

- **Support the safeguarding of individuals (SCDHSC0024).** Utilising acquired skills in mental health, child protection, medication and other areas of healthcare as required for the role, ensuring policies and legislation are followed.

2.2 Clinical care

- **Obtain a patient history (CHS168) and Establish a diagnosis of an individual's health condition (CHS40)** by undertaking face to face assessment and treatment of patients who are invited to base for consultation or undertake home visits, in accordance with the relevant protocols. This includes providing assessment, treatment and working diagnosis at point of first contact, by attending to patients in a variety of clinical or non-clinical settings according to patients' needs. Patients may present with the following problems:
- **Investigate and diagnose an individual presenting for emergency assistance with:**
 - **breathlessness (EC11A)**
 - **bleeding and fluid loss (EC11B)** (including gynaecological but not pregnancy related)
 - **pain (EC11C)** (including chest and abdominal pain)
 - **tissue trauma (EC11D)** (including musculoskeletal injury)
 - **skin rashes/dermatological features (EC11E)**
 - **toxic ingestion (EC11F)** (may include use of TOXBASE)
 - **altered behaviour (EC11H)** (non-crisis)
 - **fever (EC11I)**
 - **fall (EC11J)**
 - **ENT (EC11K) problems**

- **Perform standard tests using manual methodologies or commercial kits (CHS193) and Obtain supporting information to inform the assessment of an individual (EUSC02).** Undertake and interpret basic point of care tests e.g. urinalysis, peak flow, blood glucose.
- **Determine a treatment plan for an individual (CHS41) and Manage an individual's medication to achieve optimum outcomes (CHS74)** within the scope of PGD, escalating where appropriate. Competently carry out a wide variety of procedures and interventions which require high levels of knowledge and skills requiring dexterity and accuracy. This will include: Identify and list any service specific skills: Please note any additional skills which are identified as being required and were not part of initial training must undergo a risk assessment using the Calderdale Framework –risk assessment tool and relevant competency must be written and training must be put in place.
- **Arrange services and support with other healthcare providers (CHS98).** Act as a referral agent to ensure that patients are safely discharged from IUC with appropriate instructions for aftercare and follow up. This may include the need to **Contribute to social care in emergency situations (EC21).**
- **Prepare prescriptions for prescription only medication (CHD HK1).** Work to PGD, working within parameters of agreed clinical guidelines and in accordance with current legislation regarding the supply and prescribing of medications.

2.3 Leadership

- **Develop and sustain productive working relationships with colleagues (CFAM&LDD1)** in order to provide clinical support to health advisors, senior health advisors, clinical advisors and dental nurses on shift, ensuring safe effective working. Actively communicate with all senior managers of any factors affecting the service delivery at the time an issue is highlighted. Act as a professional role model at all times. Facilitate clear patient pathways through primary, community, secondary and tertiary care.
- **Contribute to the effectiveness of teams (SCDHSC0241),** using knowledge and experience to support other front line staff in making decisions relating to patient care leading to safe service user outcomes. Ensure the immediate needs of the patient are met. Attend and contribute to meetings and specialist interest groups locally and nationally. Work with the service delivery team to contribute to the development and delivery of service and facilitate and actively participate in the continuous quality improvement (CQI) audit process to develop individual performance and achieve set targets.
- **Provide leadership in your area of responsibility (CFAM&LBA2),** by providing clinical leadership and motivating and supporting colleagues to maintain and improve their performance.
- **Promote the rights and diversity of individuals (SCDHSC311).** This includes promoting the capacity of individuals to exercise their rights and responsibilities and promoting a culture which values and respects the diversity of all individuals. It also addresses individuals' rights in relation to information about themselves and the need to promote confidence in individuals that their rights will be upheld in the work setting.

2.4 Personal and people development

- **Undertake coaching or mentoring (LSICM05)** and training with staff of all grades and students in relation to clinical practice generally as well as in own specialism, to maintain an up to date knowledge of current practice. Share and utilise areas of specialist practice or special interest with peers and colleagues to inform patient care.
- **Provide (clinical) supervision to other individuals (GEN35)** including peers, health advisors and service advisors to support their ongoing development.
- **Make use of supervision (GEN36)** i.e. participate in regular clinical and operational supervision in line with local guidelines in order to continually improve your performance and facilitate ongoing development, and meet requirements of professional registration.

2.5 General duties

- **Act within the limits of your competence and authority (GEN63)** working within the parameters of your own skills and knowledge and maintaining responsibility for you own personal development.
- **Make sure your actions reduce risks to health and safety (PROHSS1)** by maintaining a tidy office/call centre at all times, cleaning equipment before use and supporting the maintenance of equipment by reporting any faults as per local procedures. Adhere to health and safety policies and report incidents and risks identified through Datix or via line manager.
 - **Comply with legal requirements for maintaining confidentiality in healthcare (CHS169)** by maintaining strict confidentiality to all issues concerned with the service and adhere to

requirements of the Data Protection Act 1984, information governance and Caldicott Principles. Keep immediate and accurate records of patient user enquiries during the consultation.

2.6 Managing self

- **Manage and organise your own time and activities (HT4)**, actively working independently, and being accountable and responsible for managing your own approach to workload, risk assessment.

2.7 Professional

- **Develop and maintain your professional networks (CFAM&LAA3)** to ensure you work within and promote the regulatory requirements, codes and guidance defined by the appropriate regulatory body e.g. NMC/HPC. Develop and maintain your own expertise, practice and competence in the role, and promote the organisation's vision and values.
- **Monitor your own work practices (GEN23)** to ensure you maintain your own competence through CPD and seek feedback on own performance from direct reports and line manager. Maintain personal responsibility and accountability for own ongoing active professional registration and fitness to practice. Participate in regular performance review with line manager/clinical supervisor. Identify and use information sources to support and underpin clinical decision-making.

3. Probationary periods

All staff new to the organisation are required to undergo relevant CDSS training. Continuation in the role is dependent upon successful completion of training.

4. Equality and diversity

All staff have a role to play in supporting and championing equality and ensuring that our workplace and the services we deliver are free from discrimination. This includes delivering the organisation's obligations as they are set out within the Equality Act and Public Sector Equality Duty, which means not only ensuring equal opportunities for staff and service users, but also ensuring that patients have equal access to NHS services and that health inequalities are reduced across all protected characteristics. Treating people equally may mean treating people differently or more favourably, in order to ensure equal access – for example, by giving staff with dyslexia more time to sit tests, or by giving people with learning disabilities longer appointments. All staff must ensure that they have the skills, knowledge and competences outlined within the competency framework to ensure that their practice and the care they provide meets the needs of all individuals with protected characteristics, where appropriate taking account of cultural or language needs, respecting difference and taking action to reduce health inequalities.

All employees must be aware of their obligations and to abide by the spirit and nature of these requirements to avoid direct and indirect discrimination, instead championing equal access to health and care outcomes.

Urgent Care Practitioner

Requirements	Essential	Desirable	How identified
Qualifications	<p>Regulated Health Care Professional with existing registration</p> <p>Educated to degree level or equivalent</p> <p>Have or be working towards Master's module in Advanced Clinical Assessment and Management</p>	<p>Supervision/mentoring training or qualification.</p> <p>Leadership/management training or qualification</p>	<p>Application Form</p> <p>Copies of Qualification Certificates</p>
Experience	<p>Administration of medication within Patient Group Directives (PGD)</p> <p>Substantial consolidated experience of clinical practice in a range of setting including assessing minor illnesses/injuries face to face</p> <p>In depth knowledge of and consolidated clinical practice in a specialist clinical area</p> <p>Experience of working in a multi-professional/multi agency environment</p> <p>Experience of coaching and mentoring others</p> <p>Understanding of patient care in primary care settings</p>	<p>Paramedic or Pharmacist administration of medicines by exemption</p> <p>Previous experience of supporting or managing change</p> <p>Previous experience working remote consultation</p>	<p>Application Form</p> <p>Interview</p> <p>References</p>
Training	<p>Willing and able to participate in CSSD training if required</p> <p>Commitment to CPD and lifelong learning, including clinical supervision</p>	<p>Knowledge of the client group and evidence of related training</p> <p>Previous competency based training in relevant field.</p>	<p>Application Form</p> <p>Interview</p>
Practical / intellectual skills	<p>Ability to engage with people and motivate and support them to work to high standards</p> <p>Calm under pressure, able to use initiative and make decisions</p> <p>Excellent interpersonal/communication skills with a variety of media and all levels of staff. This includes the ability to communicate in difficult, challenging non face to face environments</p> <p>High level of clinical reasoning skills</p> <p>Able to problem solve</p> <p>Ability to work as part of the organisational team</p> <p>Ability to contribute to and manage change</p> <p>Organised with effective time management</p> <p>Adaptable and self-motivated</p> <p>Competent IT and keyboard skills</p>		<p>Application Form</p> <p>Interview</p>
Job circumstances	<p>Commitment to role</p> <p>Able to work unsocial hours</p> <p>Flexibility to meet service /rota needs</p> <p>Ability to travel to all sites on request and external meeting locations on request</p>		<p>Health at Work Form</p>
General	<p>Must be eligible to work in the UK</p> <p>Ability to deal sensitively with distressing, emotional situations</p> <p>Conscientious, reliable and resourceful</p> <p>Professional attitude to employment</p> <p>Self starter</p>		<p>Application Form</p> <p>Interview</p>

job description

person specification

core competences

Urgent Care Practitioner

1. Communication	Date achieved	Assessor signature
Level 4 - Develop and maintain communication with people on complex matters, issues and ideas and/or in complex situations		
<ul style="list-style-type: none"> • Encourages effective communication between all involved 		
<ul style="list-style-type: none"> • Develops partnerships and actively maintains them 		
<ul style="list-style-type: none"> • Anticipates barriers to communication and takes action to improve communication 		
<ul style="list-style-type: none"> • Articulates a vision for trust focus which generates enthusiasm and commitment from both employees and patients/wider public 		
<ul style="list-style-type: none"> • Is persuasive in putting forward own view and that of the organisation 		
<ul style="list-style-type: none"> • Communicates effectively and calmly in difficult situations and with difficult people 		

Comments and Action Plan

Urgent Care Practitioner

2. Personal and People Development	Date achieved	Assessor signature
Level 4 -Develop oneself and others in areas of practice		
<ul style="list-style-type: none"> • Contributes to development in the workplace as a learning environment 		
<ul style="list-style-type: none"> • Actively creates opportunities to enable everyone to learn from each other and from external good practice 		
<ul style="list-style-type: none"> • Uses a coaching approach to encourage others to develop 		
<ul style="list-style-type: none"> • Ensures all employees managed have annual appraisals and personal development plans in place and comply with mandatory training 		

Comments and Action Plan

Urgent Care Practitioner

3. Health, Safety and Security	Date achieved	Assessor signature
Level 3 - Promote, monitor and maintain best practice in health, safety and security		
<ul style="list-style-type: none"> Identifies and manages risk at work and helps others to do the same 		
<ul style="list-style-type: none"> Makes sure others work in a way that complies with legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Carries out, or makes sure others carry out risk assessments in own area. Checks work area to make sure it is free from risks and conforms to legislation and organisational policies and procedures on health, safety and risk management 		
<ul style="list-style-type: none"> Takes the right action when risk is identified 		
<ul style="list-style-type: none"> Finds ways of improving health, safety and security in own area 		

Comments and Action Plan

Urgent Care Practitioner

4. Service Improvement	Date achieved	Assessor signature
Level 3 - Appraise, interpret and apply suggestions, recommendations and directives to improve services		
<ul style="list-style-type: none"> Identifies and evaluates potential improvements to the service 		
<ul style="list-style-type: none"> Discusses improvement ideas with appropriate people and agrees a prioritised plan of implementation to take forward agreed improvements 		
<ul style="list-style-type: none"> Presents a positive role model in times of service improvement 		
<ul style="list-style-type: none"> Supports and works with others to help them understand the need for change and to adapt to it 		
<ul style="list-style-type: none"> Enables and encourages others to suggest change, challenge tradition and share good practice with other areas of the organisation 		
<ul style="list-style-type: none"> Evaluates the changes made and suggests further improvements where needed 		
<ul style="list-style-type: none"> Evaluates draft policies and strategies and feeds back thoughts on impacts on users and the public 		

Comments and Action Plan

Urgent Care Practitioner

5. Quality	Date achieved	Assessor signature
Level 3 - Contribute to improving quality		
<ul style="list-style-type: none"> Promotes quality approaches making others aware of the impact of quality 		
<ul style="list-style-type: none"> Understands own role, its scope and how this may change and develop over time in developing a high quality organisation 		
<ul style="list-style-type: none"> Reviews effectiveness of own team and helps and enables others to work as a team 		
<ul style="list-style-type: none"> Prioritises own workload and manages own time in a manner that maintains and promotes high quality 		
<ul style="list-style-type: none"> Evaluates others work in own area and raises quality issues and related risks with the appropriate people 		
<ul style="list-style-type: none"> Supports changes in own area that improves the quality of systems and processes 		
<ul style="list-style-type: none"> Takes appropriate action when there is a persistent problem with quality 		

Comments and Action Plan

Urgent Care Practitioner

6. Equality and Diversity	Date achieved	Assessor signature
Level 3 - Promote equality and value diversity		
<ul style="list-style-type: none"> • Interprets equality, diversity and rights in accordance with legislation, policies, procedures and good practice 		
<ul style="list-style-type: none"> • Actively acts as a role model in own behaviour and fosters a non-discriminatory culture 		
<ul style="list-style-type: none"> • Promotes equality and diversity in own area and ensures policies are adhered to 		
<ul style="list-style-type: none"> • Manages people and applies internal processes in a fair and equal way 		
Level 4 - Develop a culture that promotes equality and values diversity		
<ul style="list-style-type: none"> • Actively promotes equality and diversity 		
<ul style="list-style-type: none"> • Monitors and evaluates extent to which legislation and policies are applied 		
<ul style="list-style-type: none"> • Monitors and acts on complaints around equality and diversity 		
<ul style="list-style-type: none"> • Actively challenges unacceptable behaviour and discrimination 		
<ul style="list-style-type: none"> • Supports people who need assistance in exercising their rights 		

Comments and Action Plan
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1. Assess an individual's health status (CHS39)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/221/>

Performance criteria	Date achieved	Assessor signature
1. Explain to the individual what your role is and the process you will go through in order to direct their request		
2. Clarify and confirm that the individual understands and accepts the actions being taken to direct their request		
3. Select and apply the correct protocols and guidelines appropriate to the individual, and the context and circumstances in which the request is being made		
4. Adhere to the sequence of questions within the protocols and guidelines		
5. Phrase questions in line with the requirements of the protocols and guidelines, adjusting your phrasing within permitted limits to enable the individual to understand and answer you better		
6. Accurately and appropriately record responses and other information obtained of relevance during immediate interaction, treatment or care of the individual		
7. Determine which service or assistance the individual requires and refer them on, as appropriate		
8. Seek prompt advice when a clear referral cannot be made or when an alternative service is not known		
9. Pass on all information obtained to the organisation who will be receiving the individual, as necessary and in line with patient confidentiality and data protection requirements		
10. Inform the individual making the request what course of action you are taking and what will happen next		
11. Explain clearly the time frame within which the individual making the request can expect to be given further assistance, giving them interim guidance, support and reassurance where appropriate		
12. Recognise when a request is beyond your remit or that of your organisation, and inform the individual of more appropriate alternative services, where known		

Comments and Action Plan

2. Retrieve and reconcile information about an individual’s medication (PHARM29.2016)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/4218/>

Performance criteria	Date achieved	Assessor signature
1. Work within the relevant Standard Operating Procedures including the relevant health and safety procedures and within your own limits of competence		
2. Ensure that the environment and timing is suitable for open and confidential discussion with the individual or third party about their medicines		
3. Communicate with the individual and key people at a pace, in a manner and at a level appropriate to the individual’s understanding, preferences and needs		
4. Explain your role and responsibilities, introduce yourself and check the individual’s identity according to local guidelines before retrieving an individual’s medication history relevant to your work area		
5. Obtain valid consent from the individual or third party in accordance with Standard Operating Procedures		
6. Check the individual’s or third party understanding of the purpose of retrieving an individual’s relevant history		
7. Check and record the individual’s allergy status		
8. Use appropriate questions to explore, clarify and confirm any unusual or ambiguous information and record the information clearly and accurately in a systematic manner		
9. Identify and document the medicines and other substances, and ascertain from appropriate sources when and how they are taken by the individual		
10. Use appropriate sources to identify details that are relevant to the individual’s medication history including: <ul style="list-style-type: none"> • medicines that have been started recently • medicines that have stopped • medicines that have changed • medicines that are used regularly • medicines that are used occasionally • medicines that are swapped or shared between individuals or their family and friends • medicines that are bought from other sources • if the individual drinks alcohol, smokes or uses other substances • if the individual has experienced any problems or difficulties with their medication 		

2. Retrieve and reconcile information about an individual’s medication (PHARM29.2016) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/4218/>

Performance criteria	Date achieved	Assessor signature
11. Report any problems, inconsistencies or adverse reactions that the individual may have experienced from their medication in line with Standard Operating Procedures		
12. Reconcile and compare the medication history to the individual’s current list of medicines		
13. Identify and document any discrepancies, changes, deletions or additions		
14. Complete all relevant documentation and store appropriately in accordance with legal and organisational requirements		

Comments and Action Plan

3. Communicate the risks to health, wellbeing and safety to a range of individuals and advise how the risks can be prevented, reduced or controlled (HP6)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2642/>

Performance criteria	Date achieved	Assessor signature
1. Keep up to date about hazards and risks by using reliable sources of expertise and information, to enable you to provide accurate advice and information on anticipated risks		
2. Communicate with individuals and groups in a vocabulary, manner and pace that is appropriate to them		
3. Where individuals and groups are seeking advice in relation to particular risks, gather information from them to enable you to make a realistic assessment of: <ul style="list-style-type: none"> • their perception of the risks • the actual risks in the situation 		
4. Where necessary, consult with colleagues, or access expert information in other ways, to make an accurate assessment of the situation and the risks involved, and to give appropriate advice		
5. Provide information and advice to enable individuals and groups to reach a better understanding of the situation and the likely risks within it		
6. Provide advice on courses of action the individuals or groups should take, where appropriate, based on your assessment of the priorities in the situation, such as: <ul style="list-style-type: none"> • contact other agencies, urgently or routinely • take preventive measures • be reassured that the risks are slight 		
7. Where appropriate, provide individuals and groups with information in other forms to support any spoken information and advice		
8. Record the information and advice you have given clearly and accurately		

Comments and Action Plan

4. Communicate effectively in a healthcare environment (GEN97)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/3001/>

Performance criteria	Date achieved	Assessor signature
1. Acknowledge and respond to communication promptly		
2. Communicate clearly and coherently taking into account the needs of individuals		
3. Select the most appropriate method of communication for the individuals		
4. Ensure that the environment for communication is as conducive as possible for effective communication		
5. Adapt your communication style to suit the situation		
6. Identify any communication barriers with the individuals and take the appropriate action		
7. Clarify points and check that you and others understand what is being communicated		
8. Actively listen and respond appropriately to any questions and concerns raised during communications		
9. Establish lines of communication which enable you to communicate with individuals in other locations in times of need or emergency		
10. Maintain confidentiality of information where appropriate to do so		

Comments and Action Plan

5. Support the safeguarding of Individuals (SCDHSC0024)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
Clarify your awareness of harm, abuse and safeguarding		
1. Access information about harm, abuse and safeguarding		
2. Show that you know factors, situations and actions that may cause or lead to harm and abuse		
3. Show that you know signs and symptoms that may indicate that an individual has been, or is in danger of being, harmed or abused		
4. Show that you know your role in safeguarding individuals and how this fits with local procedures and agreements		
5. Show that you know the role of different agencies and multi-agency working in the safeguarding of individuals		
6. Show that you know the actions you need to take when harm or abuse is suspected or has been disclosed, in line with the responsibilities of your role and local procedures		
7. Show that you know the actions you must take and those you must avoid, taking account of any future investigation into possible harm or abuse		
8. Ensure your own actions and attitudes do not contribute to situations, actions or behaviour that may be harmful or abusive		
Support practices that help to safeguard individuals from harm or abuse		
9. Recognise actions, behaviours and situations that may lead to harm or abuse		
10. Recognise signs that may indicate an individual has been, or is in danger of being, harmed or abused		
11. Report in accordance with work setting requirements any changes, events or occurrences that cause you concern about the welfare of an individual		
12. Seek support in situations beyond your experience or expertise		
13. Use supervision and support to deal with your own reactions to possible harm or abuse, within confidentiality requirements		

5. Support the safeguarding of Individuals (SCDHSC0024) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Performance criteria	Date achieved	Assessor signature
Relate to individuals and key people in ways that support safeguarding		
14. Relate to the individual and key people in ways that support trust		
15. Relate to the individual and key people in ways that help them feel able to express their fears, anxieties, feelings and concerns without worry of ridicule, rejection or retribution		
16. Relate to the individual using the way they prefer to communicate		
17. Follow work setting requirements whenever you acquire or use information that is confidential		
18. Support the individual to understand when and why you may sometimes need to share information that would otherwise be confidential Work in ways that support the rights, inclusion and well being of individuals		
Work in ways that support the rights, inclusion and well being of individuals		
1. Work with the individual to find out about their background and preferences		
2. Ensure your own actions support the individual in person centred ways		
3. Ensure your own actions respect the individual's dignity, privacy, beliefs, preferences, culture, values and rights		
4. Ensure your own actions support the individual's self esteem, sense of security and belonging		
5. Ensure your own actions support the individual's active participation, independence and responsibility		
6. Ensure your own actions support equity and inclusion and do not discriminate		
7. Take appropriate steps where the behaviour and actions of others do not support the rights, inclusion and well being of the individual Support individuals to keep themselves safe		
8. Support the individual to be aware of personal safety		
9. Support the individual to be aware of risks associated with the use of electronic communications		
10. Support the individual, key people and others to challenge any behaviour and actions that may lead to harm or abuse		
11. Support the individual and key people to make comments and complaints where necessary		

5. Support the safeguarding of Individuals (SCDHSC0024) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0024.pdf>

Comments and Action Plan

1. Obtain a patient history (CHS168)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2819/>

Performance criteria	Date achieved	Assessor signature
1. Explain your role and responsibilities and check the individual's identity according to local guidelines before the taking of an individual's history relevant to your work area		
2. Follow national and local guidelines if the individual is unable to provide a relevant history		
3. Communicate effectively in the appropriate medium to meet the individual's or third party's needs and preferences		
4. Check the individual's or third party understanding of the purpose of obtaining an individual's relevant history		
5. Respect the individual's privacy, dignity, wishes and beliefs and maintain the confidentiality of the information obtained in line with legislation and organisational requirements		
6. Obtain details of the individual's prior health status and circumstances over a sufficient period of time to inform the assessment and requirements for your work activities		
7. Use appropriate questions to explore, clarify and confirm any unusual or ambiguous information and record the information clearly and accurately in a systematic manner		
8. Accurately answer any questions at a level and pace that is appropriate to the individual's or third party needs		
9. Maintain full, accurate and legible records of information collected in line with current legislation, guidelines, local policies and protocol		

Comments and Action Plan

2. Establish a diagnosis of an individual’s health condition (CHS40)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/220/>

Performance criteria	Date achieved	Assessor signature
1. Check the individual’s identity and confirm valid consent has been obtained for the healthcare investigations or activities required to establish a diagnosis.		
2. Explain your own role, its scope, your responsibilities and accountabilities clearly to the individual and relevant carers		
3. Respect the individual’s privacy, dignity, wishes and beliefs at all times		
4. Communicate with the individual in an appropriate manner, recognising the stressful nature of a potential diagnosis		
5. Consider all the relevant evidence from the individual’s history, baseline observations and tests, and clinical examination		
6. Make use of clinical interpretations and reports to make justifiable assessment of the nature, likely causes and prognosis of the individual’s health condition in accordance with clinical governance		
7. Request further investigations, if required, following national, local and organisational guidelines and protocols		
8. Explain to the individual why you are requesting further investigations, if any, what can be expected to happen and the expected timescales to review the findings and possible implications of normal and abnormal results		
9. Provide opportunities for the individual to ask questions and increase their understanding of their condition		
10. Assess the need for support and provide reassurance where appropriate		
11. Discuss with colleagues, or seek advice from others who are able to assist, where the information you have gathered is difficult to interpret		
12. Discuss the diagnosis with the individual to enable them to think through the implications and how these can be managed		
13. Make a full, accurate and clear record of the information obtained used to establish the diagnosis		
14. Reassure the individual and relevant carers and explain and confirm understanding for the next steps		
15. Ensure you maintain the confidentiality of information at all times in accordance with information governance		

2. Establish a diagnosis of an individual's health condition (CHS40) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/220/>

Comments and Action Plan

[Although these NOS refer to 'emergency' assistance, the content meets the contextual requirements of Integrated Urgent Care services]

3. Investigate and diagnose an individual presenting for emergency assistance with breathlessness (EC11A)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/607/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as breathlessness		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

3. Investigate and diagnose an individual presenting for emergency assistance with breathlessness (EC11A) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/607/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's breathlessness the likely causes of the individual's breathlessness the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

3. Investigate and diagnose an individual presenting for emergency assistance with breathlessness (EC11A) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/607/>

Comments and Action Plan

4. Investigate and diagnose an individual presenting for emergency assistance with bleeding and fluid loss (EC11B)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/608/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as bleeding and fluid loss		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

4. Investigate and diagnose an individual presenting for emergency assistance with bleeding and fluid loss (EC11B) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/608/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's bleeding and fluid loss the likely causes of the individual's bleeding and fluid loss the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

4. Investigate and diagnose an individual presenting for emergency assistance with bleeding and fluid loss (EC11B) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/608/>

Comments and Action Plan

5. Investigate and diagnose an individual presenting for emergency assistance with pain (EC11C)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/609/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as pain		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

5. Investigate and diagnose an individual presenting for emergency assistance with pain (EC11C) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/609/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's pain the likely causes of the individual's pain the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

5. Investigate and diagnose an individual presenting for emergency assistance with pain (EC11C) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/609/>

Comments and Action Plan

6. Investigate and diagnose an individual presenting for emergency assistance with tissue trauma (EC11D)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/598/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as tissue trauma		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

6. Investigate and diagnose an individual presenting for emergency assistance with tissue trauma (EC11D) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/598/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's tissue trauma the likely causes of the individual's tissue trauma the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

6. Investigate and diagnose an individual presenting for emergency assistance with tissue trauma (EC11D) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/598/>

Comments and Action Plan

7. Investigate and diagnose an individual presenting for emergency assistance with skin rashes/dermatological features (EC11E)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/600/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as skin rashes/dermatological features		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

7. Investigate and diagnose an individual presenting for emergency assistance with skin rashes/dermatological features (EC11E) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/600/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's skin rashes/dermatological features the likely causes of the individual's skin rashes/dermatological features the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

7. Investigate and diagnose an individual presenting for emergency assistance with skin rashes/dermatological features (EC11E) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/600/>

Comments and Action Plan

8. Investigate and diagnose an individual presenting for emergency assistance with toxic ingestion (EC11F)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/603/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as toxic ingestion		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

8. Investigate and diagnose an individual presenting for emergency assistance with toxic ingestion (EC11F) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/603/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's toxic ingestion the likely causes of the individual's toxic ingestion the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

8. Investigate and diagnose an individual presenting for emergency assistance with toxic ingestion (EC11F) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/603/>

Comments and Action Plan

9. Investigate and diagnose an individual presenting for emergency assistance with altered behaviour (EC11H)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/597/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as altered behaviour		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

9. Investigate and diagnose an individual presenting for emergency assistance with altered behaviour (EC11H) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/597/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's altered behaviour the likely causes of the individual's altered behaviour the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

9. Investigate and diagnose an individual presenting for emergency assistance with altered behaviour (EC11H) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/597/>

Comments and Action Plan

10. Investigate and diagnose an individual presenting for emergency assistance with fever (EC11I)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/593/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as fever		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

10. Investigate and diagnose an individual presenting for emergency assistance with fever (EC11I) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/593/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> the nature and severity of the individual's fever the likely causes of the individual's fever the implications of pre-existing and other medical problems which the individual may have the prognosis for the individual the individual's related needs risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> at the earliest opportunity in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

10. Investigate and diagnose an individual presenting for emergency assistance with fever (EC11I) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/593/>

Comments and Action Plan

11. Investigate and diagnose an individual presenting for emergency assistance as the result of a fall (EC11J)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/594/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions arising from a fall		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

11. Investigate and diagnose an individual presenting for emergency assistance as the result of a fall (EC11J) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/594/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> • the nature and severity of the individual's fall • the likely causes of the individual's fall • the implications of pre-existing and other medical problems which the individual may have • the prognosis for the individual • the individual's related needs • risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> • at the earliest opportunity • in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

11. Investigate and diagnose an individual presenting for emergency assistance as the result of a fall (EC11J) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/594/>

Comments and Action Plan

12. Investigate and diagnose an individual presenting for emergency assistance with ear, nose and throat problems (EC11K)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/595/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly to the individual: <ul style="list-style-type: none"> • your own role, responsibilities, accountability and scope of practice • the information that is needed from the assessment and who might have access to it 		
2. Obtain the individual's informed consent to the assessment process		
3. Discuss and agree with colleagues: <ul style="list-style-type: none"> • who is responsible for aspects of the assessment and how this will be managed and reported • needs and risks and how these can best be addressed 		
4. Ensure you obtain a complete and accurate history of the presenting individual		
5. Accurately and promptly identify the additional information which you need to make a differential diagnosis		
6. Follow the appropriate procedures and protocols to arrange for any investigations or observations needed to provide you with relevant information		
7. Review all the available information, noting and taking account of any conflicting, confounding or unusual aspects		
8. Recognise accurately and promptly the differentiating features of commonly occurring conditions presenting as ear, nose and throat problems		
9. Recognise promptly the need for, and obtain, any additional information needed to clarify or confirm your analysis		
10. Identify and make use of relevant research and findings from evidence based practice to inform your interpretation		
11. Promptly seek additional views and advice from relevant others when your interpretation produces unclear results		
12. Develop a diagnosis which is: <ul style="list-style-type: none"> • justifiable given the information available at the time • likely to result in the optimum outcome for the individual 		
13. Balance any additional or unusual aspects of the individual's presenting features against their overall presentation, acknowledging any uncertainties and conflicts		
14. Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with national and organisational policy		

12. Investigate and diagnose an individual presenting for emergency assistance with ear, nose and throat problems (EC11K) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/595/>

Performance criteria	Date achieved	Assessor signature
15. Form an accurate and justifiable identification of: <ul style="list-style-type: none"> • the nature and severity of the individual's ear, nose and throat problems • the likely causes of the individual's ear, nose and throat problems • the implications of pre-existing and other medical problems which the individual may have • the prognosis for the individual • the individual's related needs • risks to the individual's health and well being in the short and longer term 		
16. Form a working diagnosis as quickly as possible		
17. Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory working diagnosis		
18. Re-evaluate and adjust, if necessary, your initial diagnosis in the light of emerging symptoms and/or the results of investigations		
19. Determine and confirm when death has occurred, within the limits of your own role, accountability and scope of practice, or inform the appropriate other of the need for them to make this confirmation		
20. Maintain full, accurate and legible records of your diagnosis and any assumptions made and make these available for future reference in line with organisational practices		
21. Initiate symptomatic treatment at the earliest opportunity in line with national, local and organisational guidelines and protocols		
22. Initiate action which provides the best possible outcome for the individual		
23. Advise the individual and any significant others of the diagnosis: <ul style="list-style-type: none"> • at the earliest opportunity • in a manner which is sensitive to their concerns 		
24. Provide opportunities for the individual and significant others to ask questions and develop their understanding of the diagnosis		
25. Identify and share with colleagues relevant details of the diagnosis you have reached and its implications for further action		

12. Investigate and diagnose an individual presenting for emergency assistance with ear, nose and throat problems (EC11K) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/595/>

Comments and Action Plan

13. Perform standard tests using manual methodologies or commercial kits (CHS193)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2337/>

Performance criteria	Date achieved	Assessor signature
1. Ensure unique identifier is attached to specimen/sample		
2. Ensure 'chain of custody' is maintained, where appropriate		
3. Ensure the correct method of preparation for the type of specimen/sample and request has been used		
4. Inspect and confirm specimen/sample is of suitable quality for testing		
5. Follow the appropriate standing operating procedures, manufacturers' instructions, policies and protocols for the method of testing and biological containment level to ensure that the test is appropriately completed		
6. Confirm the equipment, reagents and/or kits to be used are appropriate		
7. Ensure that the equipment/kit has been calibrated as per the test protocols or manufacturer's instructions		
8. Select and monitor appropriate quality control methods to ensure accuracy and precision of results		
9. Ensure that the specimen/sample is stored/disposed of appropriately once testing has been performed		
10. Ensure that all used reagents, solutions and/or kits are disposed of in a safe and appropriate manner		
11. Work within your personal scope of practice		
12. Complete all relevant records accurately and in accordance with protocols		
13. Take appropriate action to respond to an unexpected situation, problem or event		

Comments and Action Plan

14. Obtain supporting information to inform the assessment of an individual (EUSC02)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/956/>

Performance criteria	Date achieved	Assessor signature
1. Explain clearly: <ul style="list-style-type: none"> • your role and responsibilities • what information you need • the reasons why you need the information • with whom the information will be shared 		
2. Respect the individual's privacy, dignity, wishes and beliefs in your interactions with other people		
3. Check and confirm that the information is reliable, current and relates to the individual		
4. Check and confirm whether anyone acting as the source of information has the authority to: <ul style="list-style-type: none"> • provide you with relevant information about the individual • provide informed consent where the individual is unable to do so directly 		
5. Obtain informed consent from anyone acting as the source of information, where appropriate, to share the information they provide about the individual requiring immediate medical assistance		
6. Obtain details of the individual's prior health status and circumstances over a sufficient period of time to inform assessment, in accordance with the individual's presenting symptoms		
7. Use appropriate questions to explore, clarify and confirm any unusual or ambiguous information		
8. Maintain clear and accurate records clearly and accurately in a systematic and logical manner that clearly shows the history of the individual's condition and the source of the information obtained		
9. Support the assessment with as complete and accurate a picture of the individual as possible		
10. Treat all information provided to you as confidential in accordance with organisational policy and practice		
11. Communicate with people in a manner which: <ul style="list-style-type: none"> • is consistent with their level of understanding, culture, background and preferred ways of communicating • acknowledges the purpose of the communication • is appropriate to the context • encourages their participation • responds to communications of any kind from them 		
12. Constructively manage any obstacles to communication		

14. Obtain supporting information to inform the assessment of an individual (EUSC02) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/956/>

Comments and Action Plan

15. Determine a treatment plan for an individual (CHS41)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/219/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability and respond in a timely manner to meet individual's needs		
2. Confirm the identity of the individual and obtain valid consent		
3. Explain clearly your own role and its scope, your responsibilities and accountability		
4. Explain the process and importance of determining an appropriate treatment plan in a manner that is consistent with their level of understanding, culture, background and preferred ways of communicating, including: <ul style="list-style-type: none"> • the information that may be collected and access to it • the benefits and risks of different ways of meeting the individual's needs • gaining agreement for the treatment plan with the individual or carers 		
5. Encourage appropriate involvement from the individual's family and relevant others and provide opportunities for them to ask questions		
6. Fully consider the treatment options, effects, side effects, potential interactions, lifestyle and risk factors in discussions with the individual and relevant others to determine the appropriate treatment plan in line with clinical governance		
7. Explain to individuals any prescribed medications and procedures involved in the treatment plan, their effects and benefits, methods and frequency and the importance of adhering to the treatment regime		
8. Determine a clear treatment plan that meet individual's needs with individuals and relevant carers in line with clinical governance		
9. Obtain agreement for the appropriate treatment plan from the individual or relevant others to meet the individuals health status		
10. Identify other specialist services in the treatment plan where such services can help the individual and make effective arrangements for the exchange of information		
11. Establish and agree monitoring methods, including self-monitoring regimes with the individual and agree a date to review the treatment plan with the individual and relevant others		
12. Make clear, full and concise notes of the treatment plan, agreements, monitoring methods and review date on the individual's records		
13. Ensure you maintain the confidentiality of information in accordance with information governance		

15. Determine a treatment plan for an individual (CHS41) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/219/>

Comments and Action Plan

16. Manage an individual's medication to achieve optimum outcomes (CHS74)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/1205/>

Performance criteria	Date achieved	Assessor signature
1. Confirm the individual's details and their medical diagnosis at the start of the consultation		
2. Create an environment suitable for open and confidential discussion with the individual and/or carer		
3. Obtain valid consent, written or verbal, according to protocol		
4. Check drug formulation does not contradict cultural and religious directives		
5. Confirm that relevant investigations have been performed and the results are available		
6. Confirm the medication currently being taken by or being given to an individual. where a current list of medications cannot be established, this needs to be documented		
7. Assess and interpret specified monitoring markers in accordance with your scope of practice		
8. Ask the individual to explain their experiences and any problems or difficulties with the medication regime		
9. Clarify the individual's perception of the optimum outcome and identify the level of compliance with their treatment plan		
10. Discuss with the individual their experiences and report adverse reactions according to protocol		
11. Review the effectiveness of the medication in meeting the objectives of the treatment plan and whether the medication is still required. If no longer required it must be discontinued		
12. Suggest modifications where appropriate and consistent with the individual's treatment plan to achieve optimum outcomes		
13. Explain the treatment and potential side effects and their management to the individual and/or carer and accurately answer any questions at a level and pace that is appropriate to their: <ul style="list-style-type: none"> • level of understanding • culture and background • preferred ways of communicating • needs 		
14. Check that the individual (and/or carer) understands the medication and monitoring regime and any potential side effects together with their management		
15. Ensure that the individual is given written information and instructions regarding their medication		
16. Support the individual to take their medication as prescribed		
17. Reaffirm the benefits of adhering to the medication regime and the potential consequences of non compliance on their health		

16. Manage an individual's medication to achieve optimum outcomes (CHS74) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/1205/>

Performance criteria	Date achieved	Assessor signature
18. Set further review dates, if required		
19. Refer if necessary to an appropriate person for further review		
20. Ensure that the individual has details of who to contact should they be concerned about their condition		
21. Maintain clear, accurate and legible records in accordance with organisational policies, your scope of responsibility and practice		

Comments and Action Plan

17. Arrange services and support with other healthcare providers (CHS98)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2261/>

Performance criteria	Date achieved	Assessor signature
1. Develop with others a clear patient care pathway which will involve joint working with other units and Primary Care Teams, including details of: <ul style="list-style-type: none"> • the aims of the pathway • what will happen • who is responsible for doing what • by when 		
2. Establish a working relationship among care providers and provide opportunities for case meetings if required		
3. Establish communication and information networks		
4. Establish effective methods to monitor and review the progress of the joint work through a point of contact		
5. Introduce alterations to the care plan that meet the patient's aims and needs within agreed parameters		
6. Complete records of discussions and agreements accurately and clearly		

Comments and Action Plan

18. Contribute to social care during emergency situations (EC21)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/584/>

Performance criteria	Date achieved	Assessor signature
1. Clearly explain: <ul style="list-style-type: none"> • who you are and the limits on your role in arranging social care • the name and nature of the organisation you represent 		
2. Identify the nature of the social care needed by the individual		
3. Identify and confirm the details of contacts known to the individual who may be able to provide social care to meet their needs		
4. Obtain informed consent from the individual before initiating any arrangements for social care to meet their needs		
5. Make use of authorised channels of communication when requesting social care for individuals from other services		
6. Keep the individual fully informed about arrangements made on their behalf for social care.		
7. Respect the privacy, dignity, wishes and beliefs of individuals and others when working with them		
8. Interact with the individual and others in a calm, reassuring and supportive manner		
9. Identify and predict actual and potential causes of distress and take appropriate action where possible to minimise their effect on the individual and others		
10. Where relevant cause unnecessary personnel and/or bystanders to be withdrawn from the area		
11. Support and monitor the emotional and psychological status of the individual and others throughout and encourage them to promote their own health and well being		
12. Promptly alert the team providing emergency assistance to any issues or risks arising for the individual's emotional and psychological well-being		

Comments and Action Plan

19. Prepare prescriptions for prescription only medicine (CHD HK1)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/699/>

Performance criteria	Date achieved	Assessor signature
1. Keep prescription forms in a safe place		
2. Prescribe medication in line with the individual's treatment plan and condition		
3. Follow guidelines and protocols, where available, in selecting the type of medication, dosage and frequency of administration		
4. Consult an appropriate clinical supervisor, if you are unsure about the medication to be prescribed or your level of competence in prescribing it		
5. State, on the correct form for prescribing prescription-only medicines, <ul style="list-style-type: none"> • the individual's name and address • the name of the medication • the form and, where appropriate, the strength of the preparation • the total quantity of the preparation (the number of dose units) • the dose • the route for administration, if the administration route is other than oral • the end point of the prescription 		
6. Leave no blank space on the form in which the individual could add further items		
7. Sign and date the prescription, or ensure it is signed and dated by a clinician		
8. Make arrangements for repeat prescriptions, when required		
9. Ensure the prescription is cost-effective and that unnecessary supplies are not made		
10. Confirm details of prescriptions with dispensing pharmacists, when required		
11. Record the prescription for medication clearly and accurately on the individual's record		
12. Ensure that records of the individual's treatment are available only to those authorised to see them		
13. Take part in regular clinical reviews of the individual's progress including compliance with the prescribing regime		
14. Review your prescribing practice in view of new guidelines and/or evidence		

19. Prepare prescriptions for prescription only medicine (CHD HK1) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/699/>

Comments and Action Plan

1. Develop and sustain productive working relationships with colleagues (CFAM&LDD1)

<https://tools.skillsforhealth.org.uk/external/CFAM&LDD1>

Performance criteria	Date achieved	Assessor signature
1. Establish working relationships with relevant colleagues within your organisation.		
2. Recognise and respect the roles, responsibilities, interests and concerns of colleagues		
3. Seek to create a climate of trust and mutual respect, particularly where you have no authority, or shared authority, over those you are working with		
4. Seek to understand difficult situations and issues from colleagues' perspectives and provide support, where necessary, to move things forward		
5. Provide colleagues with appropriate information to enable them to perform effectively		
6. Consult colleagues in relation to key decisions and activities and take account of their views		
7. Fulfil agreements made with colleagues and let them know		
8. Advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements		
9. Identify and resolve conflicts of interest and disagreements with colleagues in ways that minimise damage to work activities and to the individuals involved		
10. Monitor and review the effectiveness of working relationships with colleagues in order to identify areas for improvement		
11. Seek and provide feedback in order to improve your own and your colleagues' performance		

Comments and Action Plan

2. Contribute to the effectiveness of teams (SCDHSC0241)

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Performance criteria	Date achieved	Assessor signature
Agree your role and responsibilities within the team		
1. Access information about the team, its objectives and its purpose		
2. Ensure you understand the information about the team, its objectives and its purpose		
3. Work with other team members to agree your role and responsibilities and how they contribute to the overall objectives and purpose of the team		
4. Work with other team members to agree their roles and responsibilities		
5. Work with other team members to clarify how you can and should contribute to team activities, objectives and purposes		
Participate effectively as a team member		
6. Carry out your agreed role and responsibilities within the team		
7. Inform other members of the team about your activities		
8. Ensure your behaviour towards other team members helps the team to function effectively		
9. Complete your commitments to other team members effectively and according to overall work priorities		
10. Where you cannot complete any commitments within timescales specified, immediately inform appropriate team members		
11. Respond to differences of opinion constructively and in ways which respect other team members' points of view		
12. Where you experience problems in working effectively with other team members, seek appropriate advice and guidance		
Contribute to improving the team's effectiveness		
13. Offer supportive and constructive assistance to team members		
14. Offer suggestions, ideas and information that will benefit team members and improve team working		
15. Invite feedback from others about how you carry out your role in the team		
16. Use suggestions and information from others to improve your practice as a team member		
17. Take responsibility for agreeing and undertaking any development and learning that will enable you to carry out your role		

2. Contribute to the effectiveness of teams (SCDHSC0241) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC0241.pdf>

Comments and Action Plan

3. Provide leadership in your area of responsibility (CFAM&LBA2)

<https://tools.skillsforhealth.org.uk/external/CFAM&LBA2>

Performance criteria	Date achieved	Assessor signature
1. Engage people within your area of responsibility in defining its direction and committing their energies and expertise to achieving its results		
2. Clearly and enthusiastically communicate a vision and shared values of where your organisation is going		
3. Ensure people understand how the vision, objectives and operational plans for your area link to the vision and objectives of the overall organisation		
4. Steer your area successfully through difficulties and challenges		
5. Develop a range of leadership styles and apply them appropriately to people and situations		
6. Communicate regularly and effectively with all the people working within your area and show that you listen to what they say		
7. Encourage people to take responsibility for their own development needs		
8. Give people support and advice when they need it especially during periods of setback and change		
9. Motivate and support people to achieve their work and development objectives and provide recognition when they are successful		
10. Empower people to develop their own ways of working and take their own decisions within agreed boundaries		
11. Encourage people to take the lead in their own areas of expertise and show willingness to follow this lead		
12. Win, through your performance and behaviour, the trust and support of people		

Comments and Action Plan

job description

person specification

core competences

4. Promote the rights and diversity of individuals (SCDHSC311)

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's capacity to exercise their rights and responsibilities		
1. Provide up to date information, appropriate explanations and support to enable the individual and key people to understand their rights and responsibilities		
2. Provide up to date information, appropriate explanations and support to enable the individual and key people to exercise their rights		
3. Work in ways that demonstrate to others how to respect and promote the views, choices and wishes of individuals and key people		
4. Work in ways that demonstrate to others how to promote active participation to maximise the individual's control over their own life		
5. Demonstrate through your practice how to promote the right of the individual to make informed choices and decisions about their life and well-being, and about taking and managing potential and actual risks		
6. Interpret the rights and responsibilities of the individual in a way that is consistent with the law, regulation and work setting requirements		
7. Provide up to date information, appropriate explanations and support to enable the individual and key people to acknowledge the complexities of decisions that may need to be made in order to balance their rights, preferences and responsibilities		
8. Seek assistance when conflicts arise that you cannot deal with		

4. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote a culture that values and respects diversity		
9. Work with the individual, key people and others to understand the cultural experience, background and beliefs of the individual		
10. Identify how and where to access expertise on specific cultures or aspects of culture		
11. Access expertise and advice from people, groups and networks to enhance your understanding of the individual's culture, background and beliefs		
12. Work with the individual, key people and others to enhance aspects of the environment, practice and behaviour that are beneficial to an inclusive culture		
13. Work with the individual, key people and others to address aspects of the environment, practice and behaviour that may create barriers to an inclusive culture		
14. Ensure that activities and practices use the individual's culture and life experiences as a resource		
15. Support the individual to consider how they may wish to build upon their cultural experience in ways that promote participation, inclusivity and co-operation with others		
16. Demonstrate through your practice how to support the individual's right to communicate using their preferred language and method		
17. Model behaviour that encourages others to work in ways that promote equality and respect diversity		
18. Challenge practices and processes that prevent the individual having equal opportunity to services, support and facilities		
19. Seek assistance when you are having difficulty promoting equality and diversity		

4. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Performance criteria	Date achieved	Assessor signature
Promote the individual's rights in relation to information about themselves		
20. Work in ways that demonstrate to others how to support the right of the individual to access information about themselves		
21. Disclose information about the individual only to those who have the right and need to know, and once proof of identity has been obtained		
22. Encourage others to disclose information only to those who have the right and need to know, and once proof of identity has been obtained		
23. Ensure that records and reports about work with the individual are completed within confidentiality agreements and according to legal and work setting requirements		
24. Maintain confidentiality when storing and accessing information about the individual		
25. Work in ways that demonstrate to colleagues how to respect and protect the privacy of the individual when handling information about them		
Promote confidence that the rights of individuals will be upheld in the work setting		
26. Ensure your own practice is always consistent with the law, regulation and work setting requirements		
27. Support others to work within the law, regulation and work setting requirements		
28. Use sensitively and responsibly the influence that accompanies your job role and responsibilities		
29. Support others to use their influence sensitively and responsibly		
30. Work in ways that demonstrate you are honest, trustworthy, reliable and dependable at all times		
31. Encourage others to be honest, trustworthy, reliable and dependable in their work		
32. Work with others to ensure all communication is appropriate, open, accurate and straightforward		
33. Ensure that you honour your work commitments and support colleagues to do the same		
34. Ensure that you and others declare any personal interests that might influence judgements and practice		
35. Work in ways that demonstrate to others how to support the right of the individual to compliment, comment and complain about services they are receiving and to have any comments and complaints taken seriously		

4. Promote the rights and diversity of individuals (SCDHSC311) *continued*

<https://tools.skillsforhealth.org.uk/external/SCDHSC3111.pdf>

Comments and Action Plan

1. Undertake coaching or mentoring (LSICM05)

<https://tools.skillsforhealth.org.uk/external/LSICM05.pdf>

Performance criteria	Date achieved	Assessor signature
1. Plan coaching or mentoring objectives and goals with the client to meet identified aspirations, motivations and priorities		
2. Agree approaches to deliver the planned objectives and goals		
3. Apply coaching or mentoring methods to achieve agreed objectives and goals		
4. Elicit motivation in clients to work towards their objectives and goals		
5. Provide opportunities for the client to review progress towards achievement of their goals		
6. Check with the client that that the coaching or mentoring has met the needs and expectations		
7. Take timely action to support clients who may not be achieving their objectives and goals		
8. Enable the client to take responsibility for and ownership of their objectives and goals		
9. Review the coaching or mentoring agreement and reflect on progress toward objectives and goals with the client		
10. Enable clients to revise objectives, modify goals and plan new ones based on their progress		
11. Confirm with the client the course of action and methods to achieve outstanding goals, modified goals or identified new ones		
12. Agree and record the interactions, outcomes and progress towards objectives and goals with the client in accordance with organisational requirements		

Comments and Action Plan

2. Provide (clinical) supervision to other individuals (GEN35)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2295/>

Performance criteria	Date achieved	Assessor signature
1. Agree with individuals the nature, frequency and purpose of routine contact and how to contact you if they are in need of additional discussion, advice or supervision		
2. Agree with individuals the confidential nature of the supervision relationship		
3. Maintain contact with individuals to provide opportunities for feedback, discussion and support		
4. Supervise individuals in the manner and at the frequency agreed with them		
5. Enable individuals to reflect on and make decisions about levels of contact		
6. Enable individuals to reflect on and make decisions about the objectives and outcomes of their work		
7. Enable individuals to identify their roles and responsibilities in carrying out their work		
8. Enable individuals to identify the limits of their current competence		
9. Enable individuals to reflect on and make decisions on how their work relates to evidence-based practice		
10. Enable individuals to reflect on and make decisions on the need for intervention by other specialist workers and agencies		
11. Actively monitor that professional and behavioural boundaries are clear and are being observed by individuals in their work relationships		
12. Challenge appropriately those individuals who show signs of becoming complacent with the progress of their work and re-emphasise their responsibilities and accountabilities for that work		
13. Offer individuals appropriate support to manage their work effectively		
14. Supervise individuals at a sufficient level to ensure that they only undertake activities for which they are competent and which are within their remit		
15. Actively monitor the effect which undertaking different activities has on individuals and take appropriate action where there are concerns that it is detrimental to their health or social well-being		

Comments and Action Plan

3. Make use of supervision (GEN36)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Performance criteria	Date achieved	Assessor signature
1. Identify the nature of the supervision you require		
2. Assess the available supervision in relation to your identified needs		
3. Select a qualified supervisor to best meet your needs		
4. Identify the role and value of supervision as a key component in professional practice		
5. Seek the frequency of supervision necessary for safe effective practice		
6. Clarify the context, accountability and arrangements for supervision, and explore the implications of these with your supervisor		
7. Clarify and agree with your supervisor: <ul style="list-style-type: none"> • roles • joint responsibilities • commitments • aims and objectives • ways of working • arrangements for monitoring and reviewing the supervision • the timing and process of changing or ending the supervisory relationship 		
8. Negotiate a supervisory contract with your supervisor which: <ul style="list-style-type: none"> • meets the identified purposes of the supervision • identifies the content and agenda for each supervisory session with your supervisor 		
9. Recognise appropriate cases and aspects of your work which require attention in supervision		
10. Bring mistakes and difficult moments in therapeutic practice to supervision		
11. Manage and use the anxieties around supervision to engage in non-defensive reflection, during and following, supervision		
12. Develop the ability to question and challenge your supervisor and use this as a tool for your own development		
13. Use your reflections on the supervisory relationship in supervision and to inform aspects of your work with individuals		
14. Review the process, outcomes and continuing effectiveness of supervision against the aims and objectives		
15. Consider any possible changes to the current supervision		
16. Identify unresolved issues, future supervision requirements and ways of achieving these		

3. Make use of supervision (GEN36) *continued*

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2296/>

Comments and Action Plan

1. Act within the limits of your competence and authority (GEN63)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/85/>

Performance criteria	Date achieved	Assessor signature
1. Adhere to legislation, protocols and guidelines relevant to your role and field of practice		
2. Work within organisational systems and requirements as appropriate to your role		
3. Recognise the boundary of your role and responsibility and seek supervision when situations are beyond your competence and authority		
4. Maintain competence within your role and field of practice		
5. Use relevant research based protocols and guidelines as evidence to inform your practice		
6. Promote and demonstrate good practice as an individual and as a team member at all times		
7. Identify and manage potential and actual risks to the quality and safety of practice		
8. Evaluate and reflect on the quality of your work and make continuing improvements		

Comments and Action Plan

2. Make sure you reduce risks to health and safety (PROHSS1)

<https://tools.skillsforhealth.org.uk/external/PROHSS1.pdf>

Performance criteria	Date achieved	Assessor signature
Identify the hazards and evaluate the risks at work:		
1. Identify which workplace instructions are relevant to your job		
2. Identify those working practices in your job which may harm you or others		
3. Identify those aspects of your work which could harm you or others		
4. Check which of the potentially harmful working practices and aspects of your work present the highest risks to you or to others		
5. Deal with hazards in accordance with workplace instructions and legal requirements		
6. Correctly name and locate the people responsible for health and safety at work		
Reduce the risks to health and safety at work:		
7. Control those health and safety risks within your capability and job responsibilities		
8. Carry out your work in accordance with your level of competence, workplace instructions, suppliers' or manufacturers' instructions and legal requirements		
9. Pass on suggestions for reducing risks to health and safety to the responsible people		
10. Make sure your behaviour does not endanger the health and safety of you or others at work		
11. Follow the workplace instructions and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products		
12. Report any differences between workplace instructions and suppliers' or manufacturers' instructions		
13. Make sure that your personal presentation and behaviour at work: <ul style="list-style-type: none"> protects the health and safety of you and others meets any legal responsibilities, and is in accordance with workplace instructions 		

Comments and Action Plan

job description

person specification

core competences

3. Comply with legal requirements for maintaining confidentiality in healthcare (CHS169)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2820/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability throughout		
2. Establish the identity of an enquirer prior to providing any information or data		
3. Ensure that enquiries are routed to the appropriate person if the request is outside your responsibility and accountability		
4. Communicate effectively in the appropriate medium to meet the individuals needs and preferences		
5. Give clear, concise and accurate information or other data where this is within your scope of practice and responsibility		
6. Respond correctly to any questions which are within your area of responsibility and refer any questions that you cannot answer to the appropriate person		
7. Ensure you retain the confidentiality of the individuals information or data in line with legislation and organisational requirements		
8. Where appropriate, ensure the safe and secure transfer of the individual's information or data to the enquirer		
9. Record the request for any information or data supplied to maintain an audit trail of persons in receipt of information		
10. Maintain full, accurate and legible records in line with current legislation, guidelines, local polices and protocols		

Comments and Action Plan

1. Manage and organise your own time and activities (HT4)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2501/>

Performance criteria	Date achieved	Assessor signature
1. Agree with your manager and/or work team: <ul style="list-style-type: none"> • who you will be working with • when • where 		
2. Plan your work and time so that you can meet the commitments you have made with individuals and the requirements of your organisation		
3. Identify the risks of the work and how you can best manage the risks to prepare for your work commitments in advance		
4. Undertake your work to time as far as it is possible to do so		
5. Learn from what happens and change your plans accordingly		
6. Seek help and support from your manager and/or work team when you have difficulties meeting your commitments		
7. Complete records of your work activities according to legal and organisational requirements		

Comments and Action Plan

1. Develop and maintain your professional networks (CFAM&LAA3)

<https://tools.skillsforhealth.org.uk/external/CFAM&LAA3>

Performance criteria	Date achieved	Assessor signature
1. Establish professional networks of contacts which meet your current and future needs for information and resources		
2. Ensure that key members of your professional networks have an accurate idea of your knowledge, skills and competence and are aware of the benefits of networking with you		
3. Establish boundaries of confidentiality between yourself and members of your professional networks		
4. Agree guidelines for exchanging information and resources, where necessary		
5. Develop your professional networks to reflect your changing interests and needs		
6. Use technology effectively to develop and maintain your professional networks		
7. Make active use of the information and resources gained through your professional networks		
8. Introduce people and organisations with common interests to each other		

Comments and Action Plan

2. Monitor your own work practices (GEN23)

<https://tools.skillsforhealth.org.uk/competence/show/html/id/2051/>

Performance criteria	Date achieved	Assessor signature
1. Work within your level of competence, responsibility and accountability		
2. Allocate monitoring activities within your work at regular intervals consistent with legal, professional and organisational requirements		
3. Adjust the frequency of monitoring where necessary to ensure compliance with quality systems and whenever risks are identified		
4. Monitor your work activities and outcomes against the relevant quality indicators and standards		
5. Access information from appropriate sources as relevant to the monitoring activity		
6. Carry out all monitoring checks correctly and accurately		
7. Obtain the correct and complete data relevant to the monitoring activity		
8. Correctly identify any non-compliance or variance in work activities and outcomes against relevant quality indicators		
9. Report instances of non-compliance or variance with quality standards accurately and promptly to relevant people		
10. Use the monitoring results to improve your working practices and outcomes		
11. Access appropriate support to improve your practice where required		
12. Act on any recommendations to improve performance and quality outcomes		
13. Review any changes to working practices as required to confirm and sustain improvements		
14. Maintain clear, accurate and complete records of your monitoring activities and outcomes in line with current legislation, guidelines, local policy and protocols		

Comments and Action Plan

Acronyms

ACP	Advanced Clinical Practitioner
AHP	Allied Health Professional
CAS	Clinical Assessment Service
CDSS	Clinical Decision Support System
CPD	Continued Professional Development
CQI	Continuous Quality Improvement
DoS	Directory of Service
EWS	Effective Workforce Solutions
HCPC	Health and Care Professions Council
HEE	Health Education England
IUC	Integrated Urgent Care
KSF	Knowledge and Skills Framework
MDT	Multi-Disciplinary Team
MSc	Master of Science
NHSE	NHS England
NMC	Nursing, Midwifery Council
PELC	Partnership of East London Co-operatives Limited
SfH	Skills for Health
TTS	Telephone Triage System
UEC	Urgent and Emergency Care
WFDP	Workforce Development Programme

Further Information

Apprenticeships

Funding matters

Useful guidance about apprenticeship funding and the apprenticeship levy.

<https://www.gov.uk/government/publications/apprenticeship-levy-how-it-will-work/apprenticeship-levy-how-it-will-work>

This factsheet, from NHS Employers, is another useful source of information:

<http://www.nhsemployers.org/case-studies-and-resources/2017/01/apprenticeship-levy-fact-sheet>

New and developing standards

Standards are developed by employer groups known as 'trailblazers'. The standard will show what an apprentice will be doing and the skills required of them, by job role. This site lists which standards are available and their current status, whether in development or approved for delivery.

This site also includes: information about funding bands, i.e. how much the standards will cost each employer; information on training providers; and information on Trailblazers.

<https://www.gov.uk/government/collections/apprenticeship-standards>

Skills for Health: Healthcare Apprenticeships online

This site helps employers find the right healthcare apprenticeship standards online.

<https://haso.skillsforhealth.org.uk/>

Register of apprenticeship training providers

Useful signposting to organisations approved to deliver apprenticeship training for employers using the apprenticeship service. Includes links to the Register of Approved Training providers (RoATP).

<https://www.gov.uk/guidance/register-of-apprenticeship-training-providers>

Healthcare Workforce Development

Skills for Health

Skills for Health is a not-for-profit organisation committed to the development of an improved and sustainable healthcare workforce across the UK. Established in 2002 as the Sector Skills Council for Health for the UK health sector, Skills for Health helps to inform policy and standards focusing on health, education and improving the wider wellbeing of public health:

<http://www.skillsforhealth.org.uk/>

Health Education England

<https://hee.nhs.uk/>

Health Education England (HEE) supports the delivery of excellent healthcare and health improvement to the patients and public of England by ensuring that the workforce of today and tomorrow has the right numbers, skills, values and behaviours, at the right time and in the right place:

<https://hee.nhs.uk/our-work/developing-our-workforce>

<https://hee.nhs.uk/printpdf/our-work/developing-our-workforce/developing-nhs-111-workforce>

<https://hee.nhs.uk/printpdf/talentforcare/wideningparticipation>

NHS England

<https://www.england.nhs.uk/about/>

NHS England leads the National Health Service (NHS) in England, setting the priorities and direction of the NHS and encouraging and informing the national debate to improve health and care. The joint work with HEE to develop the Integrated Urgent Care/NHS 111 workforce is detailed here:

<http://www.england.nhs.uk/ourwork/pe/nhs-111/urgent-care-workforce-development/>

NHS Employers

<http://www.nhsemployers.org/>

As the voice of NHS workforce leaders, the site provides useful information on a range of topics, including improving staff retention, apprenticeships, case studies and more.