

# Qualification Specification

NCFE CACHE Level 2 Award in Customer Service  
for Health and Social Care Settings  
QRN: 603/3994/9

NCFE CACHE Level 2 Certificate in Customer  
Service for Health and Social Care Settings  
QRN: 603/0483/2

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### **Qualification reference numbers:**

NCFE CACHE Level 2 Award in Customer Service for Health and Social Care Settings  
QRN: 603/3994/9

NCFE CACHE Level 2 Certificate in Customer Service for Health and Social Care Settings  
QRN: 603/0483/2

### **Publication date**

Version 2.0	September 2017
Version 3.0	October 2017
Version 4.0	September 2018
Version 5.0	March 2019
Version 5.1	February 2020

### **Publisher**

Registered Office:  
NCFE  
Q6  
Quorum Business Park  
Benton Lane  
Newcastle upon Tyne  
NE12 8BT  
Registered Company No: 02896700 (England and Wales)  
Registered Charity No: 1034808

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## Summary of changes

This section summarises the changes to this qualification specification since the last version (March 2019)

Version	Publication Date	Summary of amendments
v5.0	March 2019	Addition of the Level 2 Award. This has altered the order of the units within the Certificate – please note that there have been no changes to the content of these units.
v5.1	February 2020	Information regarding the safeguarding and wellbeing of learners added to <a href="#">Resources</a> .



## **Section 1: General introduction**

### About this Qualification Specification

This Qualification Specification contains details of all the units and assessments you will be required to complete to gain these qualifications. It also contains extra information for Tutors and/or Assessors.

### How the qualifications work

These qualifications are made up of units, each representing a small step of learning. This allows the qualifications to be completed at your own pace.

Each unit has:

- a **unit reference** number – the unique number given to each unit at qualification approval by Ofqual
- a **level** – shows how difficult it is
- **guided learning** (GL) – the average number of hours of supervised or directed study time or assessment required to achieve the unit
- a **unit aim** – explains what is covered in the unit
- **learning outcomes** – cover what you need to do (skills) or what you need to understand (knowledge)
- **assessment criteria** – what you need to show (evidence)

Each learning outcome is linked to a number of assessment criteria. Evidence must be provided for all the assessment criteria to gain the unit.

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
1. Know substances which are commonly misused.	1.1. List <b>categories</b> of substances which are commonly misused.		
	1.2. Identify substances which are commonly misused.		



### **Total Qualification Time/Guided Learning: Definitions**

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required in order for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT is comprised of the following two elements:

- the number of hours which we have allocated to a qualification for Guided Learning
- an estimated number of hours a Learner will reasonably be likely to spend in preparation, study, or any other form of participation in education or training, but not under the immediate supervision of a Tutor or Assessor.

Centres can decide how to allocate the TQT across the units of a qualification.

Guided Learning (GL)

- GL and TQT apply to the qualification as a whole.
- We use GL to refer to the estimated guided learning hours at unit level.

### **Recognition of Prior Learning (RPL)**

Centres may recognise prior learning at their discretion if they are satisfied that the evidence provided by the learner meets the requirements of a qualification. Where RPL is to be used extensively (for a whole unit or more), advice must be given by your External Quality Advisor.

### Qualification dates

Regulated qualifications have operational end dates and certification end dates.

We review qualifications regularly, working with sector representatives, vocational experts and stakeholders to make any changes necessary to meet sector needs and to reflect recent developments.

If a decision is made to withdraw a qualification, we will set an operational end date and provide reasonable notice to our Centres. We will also take all reasonable steps to protect the interest of learners.

An operational end date will only show on the Ofqual Register of Regulated Qualifications [register.ofqual.gov.uk](https://register.ofqual.gov.uk) and on our website if a decision has been made to withdraw a qualification. After this date, we can no longer accept learner registrations. However, certification is allowed until the certification end date so that learners have time to complete any programmes of study. The certification end date will only show on the Ofqual Register once an operational end date has been set. After this date, we can no longer process certification claims.

## Understanding learning outcomes

There are two main types of learning outcome:

- **Skills** that can be performed
- **Knowledge** that can be learnt.

Sometimes they can cover a combination of the two.

### Competence-/Skills-based learning outcomes:

- Begin with 'Be able to'. The assessment criteria usually show that the evidence could be observable within a real work environment. Other methods may be applied, please see chart in Assessment Guidance section. All evidence must be based on the learner's experience in a real work environment.

### Knowledge-based learning outcomes:

- Begin with 'Know', 'Understand' or 'Know how to'.



For your convenience, knowledge-only units are indicated by a lightbulb in both the Unit Achievement Log and at the top of the units.

If a unit is not marked with a lightbulb, it is a skills unit or contains a mix of knowledge and skills.

### **Entry guidance**

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the learning outcomes and comply with the relevant literacy, numeracy and health and safety aspects of this qualification.

Learners registered on this qualification shouldn't undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

### **Support for Centres**

There are a number of support documents available that you might find useful for delivery. These are available to download from the Policies & Documents page on QualHub, or can be requested from the Customer Support team.

Our Customer Support team will support you with approvals, registrations, external quality assurance, external assessment, results and certification.

### Making use of our websites

Our websites are maintained on a regular basis and these are where the most up-to-date documents can be found. We strongly advise that these are used as a resource on an ongoing basis to ensure you always have the most current information.

All our qualification documents are version controlled, allowing you to check for updates or revisions.

### The Public Website

Our public website address is [www.cache.org.uk](http://www.cache.org.uk). The website contains information about all our qualifications, and also a link to our QualHub [www.qualhub.co.uk](http://www.qualhub.co.uk) which contains:

- Key Facts
- Qualification Specifications
- other support materials

There are also some other key documents that can be referred to when required. For example:

- Complaints Policy
- Enquiries and Appeals Policy
- Diversity and Equality Policy.

It also contains regular news updates and case studies and links to websites from other organisations that might be of interest.

### The Centre Secure website

More specific information to support Centre delivery can be found in our members area on QualHub. **This site is for Approved Centres only.**

To access the members area on QualHub, please log in using the details provided by the Centre administrator.

### **Plagiarism**

Plagiarism means claiming work that has been copied from someone or somewhere else to be your own. All the work you submit must be your own and not copied from anyone else unless you clearly reference the source of your information. Your Tutor will explain how to provide a reference list that shows where you found your information. If your Centre discovers evidence that your work is copied from elsewhere, it will not be accepted and you may be subject to your Centre's disciplinary procedure or ours. If this happens you will have to submit an additional piece of work for assessment. We will be notified of any cases of plagiarism.

#### **Buying and selling assignments**

Offering to buy or sell assignments is not allowed. This includes using sites such as eBay. If this happens, we reserve the right not to accept future entries from you.

### **Equal opportunities**

We fully support the principle of equal opportunities and oppose all unlawful or unfair discrimination on the grounds of ability, age, colour, culture, disability, domestic circumstances, employment status, gender, marital status, nationality, political orientation, racial origin, religious beliefs, sexual orientation and social background. We aim to ensure that equality of opportunity is promoted and that unlawful or unfair discrimination, whether direct or indirect, is eliminated both in its own employment practices and in access to its qualifications. A copy of CACHE's Diversity and Equality Policy is available on the website.

### **Diversity, access and inclusion**

Our qualifications and associated assessments are designed to be accessible, inclusive and non-discriminatory. We regularly evaluate and monitor the six diversity strands (gender, age, race, disability, religion, sexual orientation) throughout the development process as well as delivery, external moderation and external assessment processes of live qualifications. This ensures that positive attitudes and good relations are promoted, discriminatory language is not used and our assessment procedures are fully inclusive.

Learners who require reasonable adjustments or special consideration should discuss their requirements with their Tutor, who should refer to our Reasonable Adjustments and Special Considerations Policy for guidance. For more information on the Reasonable Adjustments and Special Considerations Policy, please see our dedicated qualifications website [www.qualhub.co.uk](http://www.qualhub.co.uk).

## **Section 2: About these qualifications**

<b>Qualification summary</b>	
<b>Title</b>	NCFE CACHE Level 2 Award in Customer Service for Health and Social Care Settings
<b>Qualification number</b>	603/3994/9
<b>Aims and objectives</b>	<p>This qualification is designed to act as an introduction and enable learners to develop the knowledge and understanding required to work with customers within the health and social care sector.</p> <p>‘Customers’ in this context refers to internal and external customers, including people who use services, their supporters, visitors, health professionals and providers of other services.</p> <p>‘Employee’ refers to a range of jobs roles both health and social care specific and non-specific, ie receptionist, cleaner, retail assistant.</p> <p>This qualification will focus on the study of customer service in health and social care.</p> <p>The objectives of this qualification are to help learners:</p> <ul style="list-style-type: none"> <li>• develop an awareness of customer service in health and social care</li> <li>• understand the needs of customers who access health and social care services.</li> </ul>
<b>Total Qualification Time (hours)</b>	75
<b>Guided Learning (hours)</b>	50
<b>Grading system</b>	Achieved/Not Yet Achieved
<b>Minimum age of learner</b>	14
<b>Real work environment (RWE) requirement/ recommendation</b>	This is a knowledge-only qualification; therefore, no real work environment placement is required.



<b>Rule of combination</b>	To be awarded the Level 2 Award in Customer Service for Health and Social Care Settings, learners are required to successfully complete 2 mandatory units.
<b>Entry requirements/recommendations</b>	<p>There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 1 qualification.</p> <p>This qualification is suitable for learners aged 14 and above.</p>
<b>Progression</b>	<p>Learners who achieve this qualification could progress to:</p> <ul style="list-style-type: none"> <li>• Level 2 Certificate in Customer Service for Health and Social Care Settings</li> <li>• Level 2 Certificate in Common Health Conditions</li> <li>• Level 2 Certificate in Awareness of Mental Health Problems</li> <li>• Level 2 Certificate in Understanding Working in the Health Sector.</li> </ul>
<b>Assessment methods</b>	Portfolio of evidence
<b>Additional assessment requirements</b>	This qualification is internally assessed and externally quality assured.
<b>Regulation information</b>	This is a regulated qualification. The regulated number for this qualification is 603/3994/9.

<b>Qualification summary</b>	
<b>Title</b>	NCFE CACHE Level 2 Certificate in Customer Service for Health and Social Care Settings
<b>Qualification number</b>	603/0483/2
<b>Aims and objectives</b>	<p>This qualification is designed to enable learners to develop the knowledge and understanding required to work with customers within the health and social care sector.</p> <p>‘Customers’ in this context refers to internal and external customers, including people who use services, their supporters, visitors, health professionals and providers of other services.</p> <p>‘Employee’ refers to a range of jobs roles both health and social care specific and non-specific, ie receptionist, cleaner, retail assistant.</p> <p>This qualification will focus on the study of customer service in health and social care.</p> <p>The objectives of this qualification are to help learners:</p> <ul style="list-style-type: none"> <li>• develop an awareness of customer service in health and social care</li> <li>• understand how to communicate effectively in a health and social care setting</li> <li>• understand the needs of customers who access health and social care services</li> <li>• understand teamwork in health and social care settings.</li> </ul>
<b>Total Qualification Time (hours)</b>	150
<b>Guided Learning (hours)</b>	94
<b>Grading system</b>	Achieved/Not Yet Achieved
<b>Minimum age of learner</b>	14
<b>Real work environment (RWE) requirement/ recommendation</b>	This is a knowledge-only qualification; therefore, no real work environment placement is required.

<b>Rule of combination</b>	To be awarded the Level 2 Certificate in Customer Service for Health and Social Care Settings, learners are required to successfully complete 4 mandatory units.
<b>Entry requirements/recommendations</b>	<p>There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 1 qualification.</p> <p>This qualification is suitable for learners aged 14 and above.</p>
<b>Progression</b>	<p>Learners who achieve this qualification could progress to:</p> <ul style="list-style-type: none"> <li>• Level 2 Certificate in Common Health Conditions</li> <li>• Level 2 Certificate in Awareness of Mental Health Problems</li> <li>• Level 2 Certificate in Understanding Working in the Health Sector</li> </ul>
<b>Assessment methods</b>	Portfolio of evidence
<b>Additional assessment requirements</b>	This qualification is internally assessed and externally quality assured.
<b>Regulation information</b>	This is a regulated qualification. The regulated number for this qualification is 603/0483/2.

### **Level 2 Award and Certificate in Customer Service for Health and Social Care Settings**

The Level 2 Certificate in Customer Service for Health and Social Care Settings provides the learner with the opportunity to study a range of topics from four main areas: customer service, communication, needs of customers and teamwork.

The smaller Level 2 Award in Customer Service for Health and Social Care Settings is nested within the Certificate.

All units in the Award and the Certificate are mandatory.

There are 4 main benefits to this nested approach:

- It enables learners to achieve in bite sizes and be certificated, if the Centre wishes, as each qualification is completed.
- The learner can carry forward units from the Award towards the larger certificate-sized qualification. (The diagram below shows this nested approach.)
- Should a learner who is registered on the Certificate not complete or achieve all the units for the Certificate, they could have achieved sufficient units for the Award. This will ensure that learners can gain some certificated achievement. (Learners will need to be registered on each qualification that the Centre claims a certificate for).
- It will enable learners to make an informed decision about progression into further study in this area.

## **Level 2 Certificate in Customer Service for Health and Social Care Settings**

(Learners must achieve **all 4** of the mandatory units.)

### **Level 2 Award in Customer Service for Health and Social Care Settings**


(Learners must achieve **BOTH** of the mandatory units.)

## **Section 3: Units**

**Unit achievement log – NCFE CACHE Level 2 Award in Customer Service for Health and Social Care Settings (603/3994/9)**

The table below lists the mandatory units which must be taken to achieve the qualification.





Unit number	Regulated unit number	Unit title	Unit type	Level	GLH
Unit 01	D/615/2204	Preparing to deliver customer service in health and social care settings	Knowledge	2	25
Unit 02	K/615/2206	Understand the specific needs of customers accessing health and social care services	Knowledge	2	25


The lightbulb icon  indicates that a unit is knowledge based.

The units above may be available as stand-alone unit programmes. Please visit [www.qualhub.co.uk](http://www.qualhub.co.uk) for further information.

### Unit achievement log – NCFE CACHE Level 2 Certificate in Customer Service for Health and Social Care Settings (603/0483/2)

The table below lists the mandatory units which must be taken to achieve the qualification.

Unit number	Regulated unit number	Unit title	Unit type	Level	GLH
 Unit 01	D/615/2204	Preparing to deliver customer service in health and social care settings	Knowledge	2	25
 Unit 02	K/615/2206	Understand the specific needs of customers accessing health and social care services	Knowledge	2	25
 Unit 03	H/615/2205	Effective communication for health and social care	Knowledge	2	28
 Unit 04	M/615/2207	Teamwork in health and social care settings	Knowledge	2	16

The lightbulb icon  indicates that a unit is knowledge based.

The units above may be available as stand-alone unit programmes. Please visit [www.qualhub.co.uk](http://www.qualhub.co.uk) for further information.

Please note that the units will appear in a different order on the NCFE Portal.

<b>Explanation of terms used at Level 2: (not all verbs are used in this qualification)</b>	
Apply	Link existing knowledge to new or different situations.
Assess	Consider information in order to make decisions.
Classify	Organise according to specific criteria.
Compare	Examine the subjects in detail looking at similarities and differences.
Define	State the meaning of a word or phrase.
Demonstrate	Show an understanding of the subject or how to apply skills in a practical situation.
Describe	Write about the subject giving detailed information.
Differentiate	Give the differences between two or more things.
Discuss	Write an account giving more than one view or opinion.
Distinguish	Show or recognise the difference between items/ideas/information.
Estimate	Give an approximate decision or opinion using previous knowledge.
Explain	Provide details about the subject with reasons showing how or why. Some responses could include examples.
Give (positive and negative points....)	Provide information showing the advantages and disadvantages of the subject.
Identify	List or name the main points. (Some description may also be necessary to gain higher marks when using compensatory marking).
Illustrate	Give clear information using written examples, pictures or diagrams.
List	Make a list of key words, sentences or comments that focus on the subject.
Perform	Do something (take an action/follow an instruction) which the question or task asks or requires.



Plan	Think about and organise information in a logical way. This could be presented as written information, a diagram, an illustration or other suitable format.
Provide	Give relevant information about a subject.
Reflect	Learners should look back on their actions, experiences or learning and think about how this could inform their future practice.
Select	Choose for a specific purpose.
Show	Supply sufficient evidence to demonstrate knowledge and understanding.
State	Give the main points clearly in sentences.
Use	Take or apply an item, resource or piece of information as asked in the question or task.



## Unit 01: Preparing to deliver customer service in health and social care settings



<b>Unit reference</b>	D/615/2204	<b>Unit level</b>	2
<b>Unit group</b>	Mandatory (Award and Certificate)		
<b>Unit guided learning hours</b>	25		
<b>Unit summary</b>	<p>In this unit learners will look at the expectations of customers within health and social care settings and the standards and values that employees in these settings should uphold.</p> <p>The learner will also review their own strengths and areas for improvement relating to customer service, and identify ways these can be developed, and ways in which feedback on a personal and organisational level can be addressed.</p>		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
1. Understand customer expectations in health and social care settings	1.1. Identify the types of customers who interact with health and social care services		
	1.2. Outline the expectations of customers of health and social care services		
	1.3. Outline the principles and values that are promoted in health and social care settings		
	1.4. Identify current service standards that apply within health and social care settings		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
	1.5. Outline the employee's role in maintaining service standards		
	1.6. Describe the employee's responsibilities towards customers		
2. Know how self-awareness can be used to develop the skills, attitudes and knowledge for effective customer service in health and social care settings	2.1. Explain the importance of being self-aware when working with customers in a health and social care setting		
	2.2. Review own skills, attitudes and knowledge in relation to customer service in health and social care		
	2.3. Outline ways to develop own skills, attitudes and knowledge in customer service		
	2.4. Identify sources of feedback on: <ul style="list-style-type: none"> <li>• individual performance</li> <li>• organisation performance</li> </ul>		
	2.5. Explain how feedback from others can contribute to self-development		
	2.6. Describe how words and actions can impact on other people		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
3. Understand how to represent a health and social care service in a positive way	3.1. Describe how to present a positive impression of: <ul style="list-style-type: none"> <li>• self</li> <li>• organisation</li> </ul>		
	3.2. Describe factors that can affect a customer's experience of using a service		
	3.3. Describe personal attitudes, interactions and behaviours that demonstrate respect and value for others		
	3.4. Describe how personal attitudes, interactions and behaviours can impact on the service provided		
4. Understand how feedback can help to improve the quality of a health and social care service	4.1. Outline ways that customers could provide feedback about a health and social care service		
	4.2. Describe how to respond to customer feedback		
	4.3. Summarise the key points in a complaints policy		
	4.4. Explain how workers and organisations can learn from positive and negative feedback		
	4.5. Outline an employee's responsibility to report and escalate concerns		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
	4.6. Explain the importance of honesty and integrity in identifying and reporting situations where expectations have not been met		

**Learner declaration of authenticity:**  
 I declare that the work presented for this unit is entirely my own work.

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Assessor sign off of completed unit: Unit 01**  
 I confirm that the learner has met the requirements for all assessment criteria demonstrating knowledge and skills for this unit.

Assessor name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For e-portfolio a signature is not required, providing the learner has a personalised and secure login.

## Assessment guidance for Unit 01: Preparing to deliver customer service in health and social care settings

### Learning outcome 1

#### Achievement descriptor

Uses information found in at least 2 sources and communicates it, mostly accurately, in own words.

#### Explanation

Learners will research customers and their expectations, values, principles, standards, and the role of employees in health and social care, presenting the information in an accessible format using their own words.

### Delivery and assessment guidance

'Customers' in this context refers to internal and external customers including people who use services, their supporters, visitors, health professionals and providers of other services.

'Employee' refers to a range of jobs roles both health and social care specific and non-specific ie receptionist, cleaner, retail assistant.

Learners should consider a range of internal and external customers including the people using the services, their supporters, visitors, health professionals, support and admin staff, managerial, contractors and providers of services from outside the setting.

Learners could investigate a range of sources that set out expectations, values and principles in health and social care organisations and the sector as a whole. This could include:

- research of an organisation's promotional literature
- website aims and objectives
- Statement of Purpose
- Service User Guide
- patients' rights as set out under the NHS Constitution.

Learners should be encouraged to relate to the 'Six Cs' (care, compassion, competence, communication, courage, commitment) as core values. They may also find the strategy for 'Dignity in care work' and the 'Skills for Care common core principles (Dignity)' useful ([www.skillsforcare.org.uk](http://www.skillsforcare.org.uk), [www.nhs.uk](http://www.nhs.uk)). Other values to consider are honesty, integrity and transparency, and the legal requirement for Duty of Candour. In relation to working with individuals, the standards set out in the 'Care Certificate' and the 'Code of Conduct for Healthcare Support Workers and Adult Social Care Workers' are useful sources for those working in a direct care role. Most health and social care settings will include their values and mission statement in promotional literature. They could also refer to professional standards such as those produced by the Nursing and Midwifery Council (NMC) or The National Institute for Health and Care Excellence (NICE).

Learners should investigate service standards, for example, the regulatory body's inspection framework for the nation they live and work in. They could access published inspection reports to see how standards are effectively met. They could explore the purpose of organisational policies and procedures in guiding staff to work in accordance with service standards and legal requirements.

Learners should describe responsibilities of people who work in health and social care services, such as working to the standards, upholding values and principles and meeting expectations. They could be encouraged to investigate the consequences when expectations and standards are not met.

Learners could present their findings as an information leaflet informing customers of what should be expected from health and social care organisations. Tutors should provide headings to direct learners to address the learning outcome fully.

### Types of evidence

Evidence could include:

- learner report (information leaflet).

### Learning outcome 2

Achievement descriptor	Explanation
<p>Identifies a range of strengths and weaknesses with supporting evidence.</p> <p>States basic ways to improve the outcome.</p>	<p>Learners will complete a self-assessment in relation to the necessary skills, knowledge and attitudes to work in health and social care and plan their development.</p>

### Delivery and assessment guidance

Learners should show recognition of the need to be aware of their own strengths and limitations so that they can review and identify development needs. Learners could then complete a skill scan or analysis devised by themselves or the Tutor, based on scoring their level of skills, attitudes and knowledge necessary for effective customer service in health and social care.

A personal development plan identifying areas of development and setting SMART goals in relation to how each can be achieved would provide suitable evidence. This may include sources of support available within and outside an organisation.

Learners should indicate sources of feedback available, including those which relate to individual performance, and who could provide this feedback. They should consider a range of formal and informal sources of feedback relating to performance and development of individual staff members. They should also look at the ways organisations seek to obtain feedback and how all sources of feedback can be used to plan and monitor own development.



Learners should demonstrate an awareness of how what they say and do can affect other people in both positive and negative ways. They could do this by reflecting on relevant experiences or Tutor-devised scenarios.

Learners could present their evidence in a personal development log, which could be reviewed towards the end of the course.

**Types of evidence**

Evidence could include:

- self-assessment and personal development plan
- case study.

**Learning outcome 3**

**Achievement descriptor**

**Explanation**

Supports points with examples.

Learners will describe ways to present a positive impression using examples of positive behaviour, attitudes and interactions.

**Delivery and assessment guidance**

Learners should consider the importance of personal hygiene, appearance and uniform or dress code in positive interactions and communication whether face-to-face, by telephone or in writing. They should also think about providing a safe, clean and welcoming environment. They should consider their part in providing a positive role model for others and how first impressions influence a customer's experience of self and the service.

Learners should describe both positive and negative factors. These may include factors that are out of their control such as long waiting times, faulty equipment or staff shortages.

Learners can provide examples of behaviour, interactions and attitudes that are positive through looking at patient or customer reviews, comments, complaints and evaluations of services that are included online. They could design a customer survey using questions that identify positive behaviours. Learners should be encouraged to think about how empathy and understanding are important factors in any interaction. They may find it useful to relate to/think about their own experiences when using health and social care services.

Learners could prepare slides or handouts for a presentation designed for use during the induction of new staff. Tutors should provide headings to direct learners to address the learning outcome fully.

**Types of evidence**

Evidence could include:

- presentation
- handout.

**Learning outcome 4****Achievement descriptor**

Uses information in at least 2 sources and communicates it, mostly accurately, into own words.

**Explanation**

Learners will research ways in which feedback can improve health and social care services by looking at complaints policies and reviews published by customers who have used services and present their findings in an accessible format.

**Delivery and assessment guidance**

Learners should identify a range of ways that customers may give positive and negative feedback about their experience of accessing a service, both formally and informally. They could access sample complaints policies provided by the Tutor or from the workplace and discuss their role in responding and supporting people to make a complaint. They should consider how complaints and comments can contribute to a culture of openness and safeguard people using a service.

Learners could investigate online reviews about services (CQC inspection reports - [www.cqc.org.uk/content/inspection-reports](http://www.cqc.org.uk/content/inspection-reports)) and evaluate what could be learned from them in terms of service provision and individual staff performance. They may look at how health and social care services monitor comments and complaints and use the information to make improvements. This would include surveys relating to the experiences of people using the service and different aspects of practice. It would be useful to investigate how these are collated and the information used to improve the quality of different aspects of the service, such as mealtimes or provision of activities.

Learners should be encouraged to look at how they can learn from, and build upon, the good practice demonstrated through positive comments as well as complaints.

Learners should demonstrate awareness of the actions to take when standards are not being met or are disregarded, including when and how to report safeguarding concerns and when whistleblowing would be necessary. They should show an understanding of the requirement for health and social care providers to demonstrate openness and transparency (Duty of Candour) and the responsibilities of individual staff in the event of customers' expectations not being met.

Learners could prepare slides or handouts for a presentation to be used at the induction of new staff. Tutors should provide headings to direct learners to address the learning outcome fully.

**Types of evidence**

Evidence could include:

- presentation
- handout.

**Additional information about the unit**

Additional unit assessment requirements

This unit is internally assessed and externally quality assured.



## Unit 02: Understand the specific needs of customers accessing health and social care services



<b>Unit reference</b>	K/615/2206	<b>Unit level</b>	2
<b>Unit group</b>	Mandatory (Award and Certificate)		
<b>Unit guided learning hours</b>	25		
<b>Unit summary</b>	<p>In this unit learners will explore a range of specific needs of customers accessing health and social care services and understand how to adapt communication styles and approaches for customers with specific needs.</p> <p>Learners will also look at how the health and social care service environment could be adapted to accommodate individual needs and how to respond to behaviour that is challenging.</p>		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
1. Understand a range of specific needs of customers accessing health and social care services	1.1. Outline how each of the following conditions may impact on the experience of customers accessing health and social care services: <ul style="list-style-type: none"> <li>• autism</li> <li>• dementia</li> <li>• learning disability</li> <li>• mental health problems</li> <li>• sensory loss</li> </ul>		
	1.2. Describe how to improve the experience of customers with specific conditions accessing health and social care services		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
	1.3. Describe how to interact in a positive and supportive way with customers in the event of: <ul style="list-style-type: none"> <li>• bereavement</li> <li>• illness</li> </ul>		
	1.4. Give examples of how communication styles and approaches can be adapted for customers with specific needs		
	1.5. Give examples of ways to present information that are accessible for customers with specific needs		
	1.6. Explain how positive attitudes towards customers with specific needs will improve their experience of accessing the care service		
2. Know how to provide a safe, welcoming and inclusive environment for diverse needs	2.1. Describe how to maintain a safe and welcoming environment		
	2.2. Outline the precautions to be taken to maintain security		
	2.3. Identify factors in a health and social care environment that may cause distress or discomfort		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
	2.4. Explain what is meant by the term 'reasonable adjustments'		
	2.5. Give examples of how the environment could be adapted to accommodate individual needs		
	2.6. Suggest ways in which working practices could be adjusted to accommodate individual needs		
	2.7. Describe how to promote privacy and dignity within the environment		
3. Understand how to respond to the behaviour of customers that others may find challenging	3.1. Suggest why customers may find a health and social care setting stressful		
	3.2. Identify signs that would indicate a customer is becoming distressed, angry or confused		
	3.3. Give examples of how people may behave in ways that others find challenging		
	3.4. Outline possible reasons why people may behave in ways that others find challenging		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
	3.5. Explain how different responses can defuse or escalate behaviour		
	3.6. Identify sources of support, information and guidance for responding to behaviour that is challenging		

**Learner declaration of authenticity:**  
 I declare that the work presented for this unit is entirely my own work.

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Assessor sign off of completed unit: Unit 02**  
 I confirm that the learner has met the requirements for all assessment criteria demonstrating knowledge and skills for this unit.

Assessor name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For e-portfolio a signature is not required, providing the learner has a personalised and secure login.



**Assessment guidance for Unit 02: Understand the specific needs of customers accessing health and social care services**

**Learning outcome 1**

**Achievement descriptor**

**Explanation**

Supports points with examples and explanations.

Makes accurate conclusions based on the information given.

Learners will discuss the needs of customers whose individual needs may impact on the way that they experience health and social care services.

Learners will provide examples of ways to adapt communication accordingly.

**Delivery and assessment guidance**

Learners will need to consider each of the conditions listed in relation to their experience of accessing an unfamiliar environment. They will need to demonstrate awareness of the effects of each condition and how it may influence the way that they make sense of the environment and interact with others.

When considering the factors that might affect a customer's experience of health and social care services, learners should consider the emotions associated with bereavement and illness and how these may impact on the way individuals behave and interact with others. They should also be encouraged to think about how a specific illness or condition may affect their communication, for example, a stroke. Learners who have access to a health and social care setting and individuals who have specific needs may be encouraged to relate to this.

Minor adaptations to styles of communication can make a substantial difference. For example, recognising that a person with autism may need more time to answer, or that a person with dementia may repeat the same question several times. Information may need to be presented in alternative ways, such as using a visual or audio format. Some customers may have a communication passport or an education, health and care plan or health action plan including details of how they like to communicate.

Learners should consider the emotions that are associated with bereavement and how grief affects different people in different ways. They will need to recognise that with each of the conditions, each customer is an individual and may be affected in different ways. Learners should also be aware of the importance of a positive attitude towards all customers. This will contribute to a proactive rather than a reactive approach and will reassure customers that they are being understood and supported.

There is scope for holistic assessment with Unit 02, learning outcome 4.

Tutor-devised case studies used to inform group discussions would provide opportunities for assessment. Learners could then answer set questions individually to demonstrate their understanding of how communication styles and approaches can be adapted to meet individual needs.

<b>Types of evidence</b>
<p>Evidence could include:</p> <ul style="list-style-type: none"> <li>• case study</li> <li>• discussion.</li> </ul>

<b>Learning outcome 2</b>	
<b>Achievement descriptor</b>	<b>Explanation</b>
Possible solutions to technical problems are identified.	Learners will identify factors causing distress or discomfort and provide examples of how adjustments can be made to accommodate a range of different needs.

<b>Delivery and assessment guidance</b>
<p>A safe and welcoming environment should be clean and accessible, with relevant information and signs displayed. A range of factors may cause distress depending on the individual customer, including the fact that it may be new and unknown to them. Lack of information, a lack of privacy, poor facilities and attitudes and behaviour of others may also cause distress or discomfort. Learners should demonstrate awareness of principles of maintaining safety through vigilance and reporting any hazards, faults or concerns.</p> <p>It is the responsibility of all staff in the setting to maintain security, for example, checking identity of visitors, signing-in procedures, the use of keypad codes to access secure areas and their role in wearing ID badges in line with workplace procedure.</p> <p>Learners should indicate ways to ensure that the environment does offer privacy and how dignity should be promoted. Tutor-devised scenarios would provide a useful basis for discussion and learners who have access to a health and social care setting should be encouraged to relate to this. They could be encouraged to access useful resources such as those relating to 'Dignity in care', 'Skills for Care common core principles (Dignity)' and the Dementia Strategy.</p> <p>Learners could produce a factsheet or infographic showing the different aspects of the environment and working practices with details of how they can be adapted. Tutors should provide headings to direct learners to address the learning outcome fully.</p>

<b>Types of evidence</b>
<p>Evidence could include:</p> <ul style="list-style-type: none"> <li>• leaflet.</li> </ul>

<b>Learning outcome 3</b>	
<b>Achievement descriptor</b>	<b>Explanation</b>
Possible solutions to technical problems are identified.	Learners will identify possible reasons for the way people behave and how to respond to this in a professional manner.
<b>Delivery and assessment guidance</b>	
<p>Learners may explore a range of different reasons for the way people behave, through a group discussion, during which they may share their experiences of accessing a health and social care service, either as a visitor, staff member or individual using the service. These reasons may involve various factors, for example, lack of information, behaviour of others and fear of the unknown. Understanding the frustrations or emotions that may trigger outbursts of frustration or aggression will help workers to respond in a more measured and reasoned way that is more likely to defuse the situation.</p> <p>Signs that indicate a customer is becoming distressed, angry or confused may vary between individuals; however, learners should be able to recognise changes in body language and behaviour that would suggest this.</p> <p>Customers who are experiencing distress or difficult emotions may behave in a way that is aggressive or threatening. Although learners should recognise the limitations of their role in dealing with these situations, they should be aware of the different responses that can either escalate or defuse behaviour. Learners should be aware of how to get help and support in relation to behaviour that is challenging and the importance of keeping safe.</p> <p>Learners could complete pre-set questions and answers, the use of Tutor-devised case studies and group discussion would help to generate evidence and develop understanding. All evidence generated through group discussion must be attributable to each individual learner.</p>	
<b>Types of evidence</b>	
<p>Evidence could include:</p> <ul style="list-style-type: none"> <li>• case study</li> <li>• group discussion.</li> </ul>	

<b>Additional information about the unit</b>	
Additional unit assessment requirements	This unit is internally assessed and externally quality assured.



## Unit 03: Effective communication for health and social care



<b>Unit reference</b>	H/615/2205	<b>Unit level</b>	2
<b>Unit group</b>	Mandatory (Certificate)		
<b>Unit guided learning hours</b>	28		
<b>Unit summary</b>	This unit covers developing positive working relationships with customers in a health and social care setting, using effective communication and removing barriers that prevent effective communication.		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
1. Understand customer relationships in health and social care settings	1.1. Outline different customer relationships in health and social care settings		
	1.2. Explain how to establish and maintain positive working relationships with customers		
	1.3. Describe how positive working relationships can improve the quality of customer service in a health and social care setting		
2. Understand different communication methods used in health and social care	2.1. Describe a range of communication methods		
	2.2. Explain how to select an appropriate method of communication for different situations		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
	2.3. Give examples of how written information should be presented in ways that meet customer and organisational expectations		
	2.4. Summarise how confidentiality should be maintained when communicating personal information		
3. Understand the skills required to interact with customers in health and social care settings	3.1. Describe the skills necessary to communicate effectively verbally and non-verbally		
	3.2. Explain what is meant by active listening		
	3.3. Describe how to promote conditions that support communication		
	3.4. Explain why it is important to observe a customer's reactions when communicating with them		
	3.5. Give examples of how to respond to different reactions of a customer		
	3.6. Describe how questioning can be used to establish customer needs and confirm understanding		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
4. Know how to overcome barriers and adapt communication to meet the needs of different customers	4.1. Identify barriers to communication		
	4.2. Describe ways to overcome barriers to effective communication		
	4.3. Identify aids, services and support for effective communication		

**Learner declaration of authenticity:**  
 I declare that the work presented for this unit is entirely my own work.

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Assessor sign off of completed unit: Unit 03**  
 I confirm that the learner has met the requirements for all assessment criteria demonstrating knowledge and skills for this unit.

Assessor name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For e-portfolio a signature is not required, providing the learner has a personalised and secure login.

## Assessment guidance for Unit 03: Effective communication for health and social care

### Learning outcome 1

#### Achievement descriptor

Supports points with examples.

#### Explanation

Learners will include examples of positive customer relationships and how these can improve the customer experience and their outcomes.

### Delivery and assessment guidance

Learners should identify a range of different relationships in health and social care. Customers could be internal, for example, interdepartmental within the organisation; and external, people using the services, their relatives, visitors and other stakeholders. Relationships may vary in different sectors depending on the nature and type of service, for example, within the NHS, domiciliary care or mental health services.

Within their explanation, learners should consider the importance of being respectful and friendly, building a rapport and making customers feel valued. They should explain ways to identify and confirm customers' expectations; how to keep customers informed and reassured, and ways to adapt their communication in response to concerns and reactions within the context of customer service.

Positive working relationships bring benefits to service delivery and learners should consider how their approach in clarifying expectations, providing information and treating everyone as an individual would improve the experience and outcomes of customers.

Learner could devise a checklist to be used when observing role-play or video clips of interactions with customers. This should be supported with a learner commentary about different relationships and improvements to the quality of service brought about by positive working relationships.

### Types of evidence

Evidence could include:

- discussion.



<b>Learning outcome 2</b>	
<b>Achievement descriptor</b>	<b>Explanation</b>
Makes accurate conclusions based on the information given.	Learners will identify appropriate methods of communication based on their assessment of situations.
<b>Delivery and assessment guidance</b>	
<p>In health and social care services different methods of communication are used to meet the diverse needs of customers. Learners should demonstrate an understanding of methods such as:</p> <ul style="list-style-type: none"> <li>• face-to-face</li> <li>• by telephone or text</li> <li>• email</li> <li>• internet</li> <li>• social networks</li> <li>• written reports</li> <li>• letter.</li> </ul> <p>They should also consider ways that information can be presented, for example, visual format and through newsletters, posters and signs. In addition to the range of methods, learners should show an awareness of how to select the most appropriate method according to the situation, type of information and individual needs.</p> <p>Information communicated in written form should be accurate and presented in an accessible format using inclusive, non-judgemental and respectful language. Learners should consider examples such as the importance of proofreading for errors, using agreed conventions and avoiding use of jargon and 'text' language. They should be encouraged to use facts rather than opinions.</p> <p>Learners should demonstrate an understanding of how the worker should maintain confidentiality when using a range of methods of communication. It is important for learners to develop an awareness of when confidential information may need to be shared to ensure the safe and effective care of individuals.</p> <p>Tutors could devise a series of scenarios with associated questions where learners suggest appropriate methods of communication, presentation of information and the precautions that should be taken to maintain confidentiality.</p>	
<b>Types of evidence</b>	
<p>Evidence could include:</p> <ul style="list-style-type: none"> <li>• discussion.</li> </ul>	

<b>Learning outcome 3</b>	
<b>Achievement descriptor</b>	<b>Explanation</b>
Makes accurate conclusions based on the information given.	Learners will observe interactions and identify effective communication skills demonstrated based on their assessment of the situation.
<b>Delivery and assessment guidance</b>	
<p>People who work in health and social care settings need to be able to communicate effectively. They will be interacting with customers who have a diverse range of communication needs and may be in complex and sensitive situations. Learners need to describe a range of skills that support communication, such as:</p> <ul style="list-style-type: none"> <li>• verbal skills – use of accessible, respectful and inclusive language and avoiding jargon</li> <li>• non-verbal skills – expression and tone of voice, use of body language, eye contact, gestures, posture and facial expression.</li> </ul> <p>Learners should consider the 6 stages of listening (hearing, attending, understanding, remembering, evaluating and responding) and skills associated with active listening such as:</p> <ul style="list-style-type: none"> <li>• giving positive signals, eg smiling, nodding</li> <li>• use of 'fillers'</li> <li>• pauses</li> <li>• reassurance</li> <li>• summarising</li> <li>• repeating back.</li> </ul> <p>They should be encouraged to recognise the importance of silence, when appropriate, and ensuring that they provide the conditions that will support communication, for example, giving time, attention, positioning and ensuring privacy. An essential element of active listening is observing the other person's reactions, confirming understanding and adapting their communication accordingly. Learners should give at least 2 examples of different reactions and what this may mean, for example, misunderstandings or different emotions.</p> <p>Learners should consider different types of questions (open, closed, leading and probing) and how and when it is effective to use each of these.</p> <p>Tutors could select video clips showing professionals communicating effectively. Learners could identify aspects of the interactions that demonstrate effective communication. They could also carry out a role-play and use this to identify how communication skills are used effectively. All evidence generated through role-play must be attributable to each individual learner.</p>	

**Types of evidence**

Evidence could include:

- role-play.

**Learning outcome 4****Achievement descriptor**

Makes accurate conclusions based on the information given.

**Explanation**

Learners will consider a range of personal and environmental barriers that may affect communication and suggest ways that these can be overcome.

**Delivery and assessment guidance**

Barriers to communication can occur for a range of reasons. Learners should identify a range of personal and environmental barriers and ways to overcome these. Examples of personal barriers may include sensory, age, language or cultural differences, and attitudes of staff. Environmental barriers may include distractions, noise, lack of privacy.

They should think about the ways workers can reduce barriers and the aids, services and support that might be available, for example interpreters or assistive technology. Learners should be encouraged to think about adapting their communication in different ways, for example using visual aids where appropriate, and ways to promote an environment that supports effective communication.

There is scope for holistic assessment with Unit 02, learning outcome 2.

Tutors could devise a series of scenarios with associated tasks where learners research and suggest appropriate approaches, aids, services and support to promote communication in a range of situations. Learners who have access to a health and social care setting may relate to their experience where appropriate.

**Types of evidence**

Evidence could include:

- discussion.

**Additional information about the unit**

Additional unit assessment requirements

This unit is internally assessed and externally quality assured.



## Unit 04: Teamwork in health and social care settings



<b>Unit reference</b>	M/615/2207	<b>Unit level</b>	2
<b>Unit group</b>	Mandatory (Certificate)		
<b>Unit guided learning hours</b>	16		
<b>Unit summary</b>	In this unit learners will consider what makes an effective team and the benefits of team work in a health and social care setting. The unit also covers possible causes of conflict and resolutions to overcome this.		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
1. Understand the importance of effective team work in health and social care	1.1. Identify different teams in health and social care		
	1.2. Describe the necessary components for an effective team		
	1.3. Explain the benefits of team working for: <ul style="list-style-type: none"> <li>• customers</li> <li>• team members</li> </ul>		
	1.4. Describe skills, attitudes and behaviour that contribute to effective team working		
	1.5. Explain the principles of sharing information within teams		

<b>Learning outcomes</b> The learner will:	<b>Assessment criteria</b> The learner can:	<b>Evidence record</b> e.g. page number & method	<b>Assessor judgement achieved</b> Initial and date
2. Know how to deal with conflict within teams	2.1. Describe how a team approach can support problem solving		
	2.2. Identify factors that may lead to conflict between team members		
	2.3. Explain how negotiation can be used to reduce the likelihood or impact of conflict		
	2.4. Identify how and when to access support and advice about resolving conflicts		

**Learner declaration of authenticity:**  
 I declare that the work presented for this unit is entirely my own work.

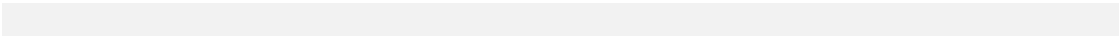
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Assessor sign off of completed unit: Unit 04**  
 I confirm that the learner has met the requirements for all assessment criteria demonstrating knowledge and skills for this unit.

Assessor name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For e-portfolio a signature is not required, providing the learner has a personalised and secure login.



<b>Assessment guidance for Unit 04: Teamwork in health and social care settings</b>
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<b>Learning outcome 1</b>	
<b>Achievement descriptor</b>	<b>Explanation</b>
Describes relevant theories and concepts.	Learners will explore the concept of teamwork and what makes an effective team and team member.
<b>Delivery and assessment guidance</b>	
<p>In health and social care, teams may be made up from multi-agency, departmental, partnership and team communities. Learners with access to an appropriate workplace should be encouraged to look at different teams within the setting, organisational flow charts and relate this to specific work roles.</p> <p>Examples of necessary components that help to make an effective team would include:</p> <ul style="list-style-type: none"> <li>• shared identity</li> <li>• clear leadership</li> <li>• roles</li> <li>• high levels of participation.</li> </ul> <p>Learners may find it helpful to investigate common theories of teamwork such as those of Tuckman or Belbin.</p> <p>Examples of potential benefits to customers include:</p> <ul style="list-style-type: none"> <li>• improved outcomes</li> <li>• continuity and quality of care</li> <li>• cost effectiveness</li> <li>• reduction in error rates</li> <li>• higher rates of customer satisfaction</li> <li>• reduction in aggression and violence.</li> </ul> <p>Learners should also recognise how team working has positive effects for team members, such as:</p> <ul style="list-style-type: none"> <li>• a feeling of belonging</li> <li>• increase in motivation and satisfaction</li> <li>• reduced sickness and turnover of staff.</li> </ul>	

Learners should describe a range of skills that are necessary to make a team work effectively. These may include:

- adaptability
- flexibility
- negotiation skills
- supporting and respecting others
- listening to others' views
- recognising strengths.

Principles of sharing information should reflect the balance between providing sufficient information to enable other members to support customers effectively and maintaining confidentiality. Learners should also consider the importance of keeping all team members informed and up to date, and ways of circulating information. They may find the principles outlined in 'A guide to confidentiality in health and social care' (Health and Social Care Information Centre, [www.hscic.gov.uk](http://www.hscic.gov.uk)) useful.

Learners could complete an assignment with a series of assessment tasks relating to the learning outcomes. This could involve them working as a team and completing self and peer assessment, scoring their effectiveness as team workers. Learners would also have to produce individualised evidence.

### Types of evidence

Evidence could include:

- learner report.

### Learning outcome 2

#### Achievement descriptor

Makes accurate conclusions based on the information given.

#### Explanation

Learners will answer questions based on case studies relating to problem solving and resolving conflict within teams.

### Delivery and assessment guidance

Learners should develop their understanding of effective teamwork and apply this to problem solving and resolving conflict within a team. They can explore the process of problem solving in terms of balancing the potential outcomes and different options available. They may consider how different perspectives, expertise, experiences and decision making can help towards solving problems effectively. Ways of working to support a team approach and negotiation may include staff meetings, briefings and handovers.

Conflict may occur when team members do not share values and objectives and learners should explore negotiation skills to help reduce conflict within a team. They should provide evidence that they recognise when accessing further support is necessary and how this can be accessed.



Learners could complete pre-set questions and answers; the use of Tutor-devised case studies and group discussion would help to generate evidence and develop understanding. Oral questioning could be used to clarify understanding where appropriate and any evidence used should be attributable to each individual learner

### Types of evidence

Evidence could include:

- case study
- questioning.

### Additional information about the unit

Additional unit assessment requirements

This unit is internally assessed and externally quality assured.



## **Section 4: Assessment and quality assurance information**

### Recommended assessment methods

A recommended range of assessment methods has been identified, which may be used for the units in these qualifications. This gives the opportunity for different learning styles and individual needs of learners to be taken into account.

If you are proposing to use an assessment method that is not included within the recommended list, you should contact your External Quality Advisor with full details of your proposed method. It will need formal approval from us before it can be used.

Each learner must generate evidence from appropriate assessment tasks which demonstrate achievement of all the learning outcomes associated with each unit.

Ref	Assessment Method	Assessing Competence/ Skills	Assessing Knowledge/ Understanding
A	Direct observation of learner by Assessor <ul style="list-style-type: none"> <li>• by an Assessor who meets the relevant Sector Skills Council's or other assessment strategy/principles and includes inference of knowledge from this direct observation of practice</li> </ul>	Yes	Yes
B	Professional discussion	Yes	Yes
C	Expert witness evidence* <ul style="list-style-type: none"> <li>• when directed by the Sector Skills Council or other assessment strategy/principles</li> </ul>	Yes	Yes
D	Learner's own work products	Yes	Yes
E	Learner log or reflective diary	Yes	Yes
F	Activity plan or planned activity	Yes	Yes
G	Observation of children, young people or adults by the learner	Yes	Yes
H	Portfolio of evidence <ul style="list-style-type: none"> <li>• may include simulation**</li> </ul>	Yes	Yes
I	Recognition of prior learning	Yes	Yes

<b>Ref</b>	<b>Assessment Method</b>	<b>Assessing Competence/ Skills</b>	<b>Assessing Knowledge/ Understanding</b>
J	Reflection on own practice in real work environment	Yes	Yes
K	Written and pictorial information	No	Yes
L	Scenario or case study	No	Yes
M	Task set by CACHE (for knowledge learning outcomes)	No	Yes
N	Oral questions and answers	Yes	Yes

### **Staffing requirements**

Centres delivering any of NCFE's qualifications must:

- have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register
- have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners
- ensure that all staff involved in assessment and internal quality assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development
- implement effective internal quality assurance systems and processes to ensure all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment
- provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

#### **Assessors and Internal Quality Assurance**

Staff involved in the Assessment and Internal Quality Assurance of these qualifications must be able to demonstrate that they have (or are working towards) the relevant occupational knowledge and/or occupational competence, at the same level or higher as the units being assessed and internal quality assured. This may be gained through experience and/or qualifications.

### Assessment strategy

#### Knowledge learning outcomes

- **Assessors** will need to be both occupationally knowledgeable and qualified to make assessment decisions.
- **Internal Quality Assurers** need to be both occupationally knowledgeable and qualified to make quality assurance decisions.

#### Competence/Skills learning outcomes

- **Assessors** will need to be both occupationally competent and qualified to make assessment decisions.
- **Internal Quality Assurers** will need to be both occupationally knowledgeable and qualified to make quality assurance decisions.

### Internal assessment

We have created some sample tasks for the internally assessed units. You can contextualise these tasks to suit the needs of your learners to help them build up their portfolio of evidence. The tasks have been designed to cover all the learning outcomes for each unit and provide opportunities for stretch and challenge. For further information about contextualising the tasks, please contact us on 0345 347 2123.

Each learner must create a portfolio of evidence generated from appropriate assessment tasks, which demonstrates achievement of all the learning outcomes associated with each unit. The assessment tasks should allow the learner to respond to a real-life situation that they may face when in employment. On completion of each unit, learners must declare that the work produced is their own and the Assessor must countersign this.

Internally assessed work should be completed by the learner in accordance with the qualification specification. A representative number of assessment hours should be timetabled into the scheme of work. Internal assessment hours must be administered outside of scheduled teaching and learning hours and should be supervised and assessed by the Tutor. Assessment activities can be integrated throughout, although separate from the teaching of the unit and do not have to take place directly at the end of the unit.

Any work submitted for internal assessment must be completed during scheduled assessment hours in accordance with the scheme of work, and must be authenticated and attributable to the learner. The Tutor must be satisfied that the work produced is the learner's own and the learner must declare that the work is their own.

In practice, this means that all of the portfolio of evidence will be completed in normal class time within scheduled assessment hours, and kept separate from any teaching and learning hours.

The internal assessment component is based on 100% coverage of the qualification content, which is assessed holistically against descriptors to achieve a grade.

If a Centre chooses to create their own internal assessment tasks, they must:

- be accessible and lead to objective assessment judgements
- permit and encourage authentic activities where the learner's own work can be clearly judged
- refer to Course File Documents on QualHub.

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they're valid and reliable and maintain the integrity of the assessment and of the standards required of this qualification.



## Internal assessment continued

### Supervision of learners and your role as an Assessor

Guidance on how to administer the internal assessment and the support you provide learners can be found on our secure website in the document **Good Practice in Internal Quality Assurance**

### Feedback to learners

Guidance on providing feedback during teaching and learning and each stage of the assessment can be found on our secure website in the document **Good Practice in Internal Quality Assurance**

### Presenting evidence

#### Written

Written evidence may be presented in word-processed or handwritten form. Audio-visual content (videos, pictures, drawings, audio) may also be used.

Tables, graphs and spreadsheets may be produced using appropriate ICT.

Any copied material must be suitably acknowledged, and quotations must be clearly marked and a reference provided wherever possible to ensure that learner work can be authenticated.

#### Recorded

Where audio-visual evidence of multiple learners is used, Centres must ensure that each learner being assessed is clearly visible and can be identified by the Quality Assurer.

The recorded evidence should allow the learner to demonstrate the learning outcomes clearly but should only show work relevant to what is being assessed. For example if a performance/participation is done as part of a group, the Quality Assurer will need to be able to see how each learner being assessed has contributed and met the learning outcomes.

To help our Quality Assurers to identify clearly when a particular learner is performing/participating we'd recommend including the following information:

- the exact start and finish times so that the Quality Assurer can go straight to that spot on the tape/recording
- a running order list and a description of each learner
- information about where the performance/recorded evidence took place
- what type of audience they were performing to (if applicable).

Centres must also ensure that the camera and microphone are set up in a suitable place to ensure good quality audio. This will allow the Quality Assurer to hear both the learner(s) and the Assessor (if applicable).

## Quality assurance

### Internal quality assurance

Internal quality assurance is the process of ensuring that everyone who assesses a particular unit in a Centre is assessing to the same standards. It's the responsibility of Internal Quality Assurers to ensure that Assessors' decisions are sampled and monitored to ensure consistency and fairness. Internal Quality Assurers are also responsible for supporting Assessors by offering advice and guidance.

The Internal Quality Assurer will follow the Centre's own sampling strategy in selecting the sample to be internally quality assured.

The Internal Quality Assurer provides the vital link between the Assessors and the External Quality Assurer and acts as the Centre's quality assurance agent.

### External quality assurance

External quality assurance monitors the IQA activity of the centre. External quality assurance of internal assessments is carried out at least once a year to ensure that assessment and grading decisions are in line with required standards. External quality assurance is carried out by External Quality Assurers who are appointed, trained and monitored by NCFE. External Quality Assurers are responsible for monitoring and sampling learners' evidence to ensure that internal assessment decisions are valid, reliable, fair and consistent with national standards. Centres are notified of their External Quality Assurer's contact details on registration of learners with us.

## **Section 5: Documents and resources**

### Useful documents

This section refers to useful documents that can be found on our website, some of which may assist with the delivery of these qualifications.

#### Learner's Evidence Tracking Log (LETL)

The LETL covers the mandatory units in this qualification and it can help learners keep track of their work. This document can be downloaded free of charge from our dedicated qualifications website [www.qualhub.co.uk](http://www.qualhub.co.uk). You don't have to use the LETL – you can devise your own evidence-tracking document instead.

### Mandatory documents

The completion of an Evidence Record and Record of Assessment Cycle form is **mandatory**. We have devised these templates for your convenience; however, you may design your own forms which comply with the content of our templates.

- Evidence Record
- Record of Assessment Cycle

We have also provided notes to guide you when completing these forms:

- Completing the Evidence Record
- Completing the Record of Assessment Cycle

The forms and guidance documents are included within **Delivering our Qualifications – Assessment and Internal Quality Assurance Guidance** on [www.qualhub.co.uk](http://www.qualhub.co.uk).

### Resources

The resources and materials used in the delivery of these qualifications, must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

### Learning resources

We offer a wide range of learning resources to support the delivery of this qualification. Please check the qualification page on the CACHE website for more information.

#### Third-party products

Products to support the delivery of these qualifications are offered by the following third-party suppliers:

- Learning Curve Group
- The Skills Network

For more information about these resources and how to access them please visit our dedicated qualifications website [www.qualhub.co.uk](http://www.qualhub.co.uk).

### Useful websites

Centres may find the following websites helpful for materials and resources to assist with the delivery of these qualifications:

- Skills for Care - [www.skillsforcare.org.uk](http://www.skillsforcare.org.uk)
- Skills for Health - [www.skillsforhealth.org.uk](http://www.skillsforhealth.org.uk)
- National Institute for Health and Care Excellence (NICE) - [www.nice.org.uk](http://www.nice.org.uk)
- Care Quality Commission (CQC) - [www.cqc.org.uk](http://www.cqc.org.uk)
- NHS Choices - [www.nhs.uk](http://www.nhs.uk)
- Health Careers - [www.healthcareers.nhs.uk](http://www.healthcareers.nhs.uk)
- Social Care Institute for Excellence - [www.scie.org.uk](http://www.scie.org.uk)