

H5SC 04 (SCDHSC0345) — Support Individuals To Manage Their Financial Affairs

Overview

This standard identifies the requirements when supporting individuals to manage their financial affairs. This includes working with individuals to access information and advice about their financial affairs and supporting them to manage and monitor their finances.

Additional Information

Scope/range related to Performance Criteria

The details in this field are explanatory statements of scope and/or examples of possible contexts in which the NOS may apply; they are not to be regarded as range statements required for achievement of the NOS.

NOTE: Where an individual finds it difficult or impossible to express their own preferences and make decisions about their life, achievement of this standard may require the involvement of advocates or others who are able to represent the views and best interests of the individual.

Where there are language differences within the work setting, achievement of this standard may require the involvement of interpreters or translation services.

Active participation is a way of working that regards individuals as active partners in their own support or support rather than passive recipients. Active participation recognises each individual's right to participate in the activities and relationships of everyday life as independently as possible.

The **individual** is the adult, child or young person you support or care for in your work.

Key people are those who are important to an individual and who can make a difference to his or her wellbeing. Key people may include family, friends, carers and others with whom the individual has a supportive relationship.

To **manage their financial affairs** may include managing their own day to day finances; ensuring that they receive the benefits and allowances to which they are entitled; managing their debts.

Others are your colleagues and other professionals whose work contributes to the individual's wellbeing and who enable you to carry out your role.

Policies and procedures are formally agreed and binding ways of working that apply in many settings. Where policies and procedures do not exist, the term includes agreed ways of working.

Scope/range related to Knowledge and Understanding

The details in this field are explanatory statements of scope and/or examples of possible contexts in which the NOS may apply; they are not to be regarded as range statements required for achievement of the NOS.

All knowledge statements must be applied in the context of this standard.

Factors that may affect the health, wellbeing and development of individuals

may include: adverse circumstances or trauma before or during birth; autistic spectrum conditions; dementia; family circumstances; frailty; harm or abuse; injury; learning disability; medical conditions (chronic or acute); mental health; physical disability; physical ill health; poverty; profound or complex needs; sensory needs; social deprivation; substance misuse.

Values

Adherence to codes of practice or conduct where applicable to your role, and the principles and values that underpin your work setting including the rights of children and adults. These include the rights:

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

Performance Criteria — What you do in your job

You must provide evidence to meet all the 17 Performance Criteria for this Unit. The Performance Criteria are grouped under headings to assist you with planning how best to meet these points.

Place the number of the piece of work where this Performance Criteria has been met in the evidence box after each criteria.

Work with individuals to access information and advice about their financial affairs

	Performance Criteria	Evidence Number where this criteria has been met
1	Access information on benefits, allowances, entitlements and debt management to ensure your own understanding is thorough and up to date.	
2	Support the individual and key people to check the benefits and allowances they may be entitled to, accessing additional expertise where necessary.	
3	Support the individual and key people to identify the information and advice that will help them manage their financial affairs .	
4	Encourage the individual to communicate which sources of information and advice will help them manage their financial affairs.	
5	Support the individual to highlight the skills and abilities they and key people have that will allow them to access and use information and advice to manage their financial affairs.	
6	Support the individual to access information and advice that suits their abilities and preferences in managing their financial affairs.	
7	Access specialist help on particular financial matters where you are unable to support the individual.	
8	Support the individual to provide feedback to people and organisations where their information and advice does not meet the needs of the individual.	

Support individuals to manage their financial affairs

	Performance Criteria	Evidence Number where this criteria has been met
9	Work in ways that promote active participation when supporting the individual to manage their financial affairs.	
10	Support the individual to complete relevant documents for accessing benefits, entitlements and specialist financial expertise.	
11	Work with the individual and others to identify the options they have for managing and monitoring their financial affairs.	
12	Support the individual to select the methods and services best suited to them.	
13	Support the individual to use the methods and services they have selected.	
14	Agree with the individual how they will review the effectiveness of the methods and services they have used.	
15	Work with the individual, key people and others to review what is working and what needs to change in order to manage and monitor financial affairs as effectively as possible.	
16	Support the individual to make any changes to the methods and services they have used to manage and monitor their financial affairs.	
17	Work collaboratively with the individual and key people to complete and maintain any records required to manage and monitor their financial affairs within confidentiality agreements and according to legal and work setting requirements and policies and procedures .	

Knowledge and Understanding — Why and how you do what you do in your job

You must provide evidence of your knowledge and understanding to meet all the 43 knowledge points for this Unit. The knowledge points are grouped under headings to assist you with planning how best to meet them.

Place the number of the piece of work where each knowledge point has been met in the 'evidence number' box after each point.

Rights

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
1	Legal and work setting requirements on equality, diversity, discrimination and rights.	
2	Your role in promoting individuals' rights, choices, wellbeing and active participation.	
3	Your duty to report any acts or omissions that could infringe the rights of individuals.	
4	How to deal with and challenge discrimination.	
5	The rights that individuals have to make complaints and be supported to do so.	

Your practice

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
6	Legislation, statutory codes, standards, frameworks and guidance relevant to your work, your work setting and the content of this standard.	
7	Your own background, experiences and beliefs that may have an impact on your practice.	
8	Your own roles, responsibilities and accountabilities with their limits and boundaries.	
9	The roles, responsibilities and accountabilities of others with whom you work.	
10	How to access and work to procedures and agreed ways of working.	
11	The meaning of person-centred/child centred working and the importance of knowing and respecting each person as an individual.	
12	The prime importance of the interests and wellbeing of the individual.	
13	The individual's cultural and language context.	
14	How to build trust and rapport in a relationship.	
15	How your power and influence as a worker can impact on relationships.	
16	How to work in ways that promote active participation and maintain individuals' dignity, respect, personal beliefs and preferences.	
17	How to work in partnership with individuals, key people and others.	
18	How to manage ethical conflicts and dilemmas in your work.	
19	How to challenge poor practice.	

Your practice (cont)

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
20	How and when to seek support in situations beyond your experience and expertise.	

Theory

21	The nature and impact of factors that may affect the health, wellbeing and development of individuals you care for or support.	
22	Theories underpinning our understanding of human development and factors that affect it.	

Personal and professional development

23	Principles of reflective practice and why it is important.	
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Communication

24	Factors that can affect communication and language skills and their development in children, young people and adults.	
25	Methods to promote effective communication and enable individuals to communicate their needs, views and preferences.	

Health and Safety

26	Your work setting policies and practices for monitoring and maintaining health, safety and security in the work environment.	
27	Practices for the prevention and control of infection in the context of this standard.	

Safe-guarding

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
28	The responsibility that everyone has to raise concerns about possible harm or abuse, poor or discriminatory practices.	
29	Indicators of potential harm or abuse.	
30	How and when to report any concerns about abuse, poor or discriminatory practice, resources or operational difficulties.	
31	What to do if you have reported concerns but no action is taken to address them.	

Handling information

32	Legal requirements, policies and procedures for the security and confidentiality of information.	
33	Legal and work setting requirements for recording information and producing reports.	
34	Principles of confidentiality and when to pass on otherwise confidential information.	

Knowledge that is Specific to this NOS

	Knowledge and Understanding <i>You need to know and understand:</i>	Evidence Number where this knowledge point has been met
35	Theories relevant to the individuals with whom you work, about: the impact being able to manage their own financial affairs may have on the identity, self-esteem and self-image of the individual.	
36	Methods of supporting the individual to express their needs and preferences about their finances and any problems they are having in managing them.	
37	How to provide the individual with accessible information about finances, benefits and allowances.	
38	How to support the individual to complete benefit/claim forms.	
39	Sources of advice and support on financial assistance and management.	
40	Methods of keeping records and details of payments and receipts.	
41	Methods of budgeting that are acceptable and appropriate for the individual.	
42	Methods of managing debts and making payments.	
43	Methods of storing money safely that are acceptable to the individual.	

The candidate and assessor must only sign below when all Performance Criteria and knowledge points have been met.

Unit assessed as being complete

Candidate's name	
Candidate's signature	
Date submitted to Assessor as complete	

Assessor's name	
Assessor's signature	
Date assessed complete	

Internal Verification

To be completed in accordance with centre's internal verifier (IV) strategy.

Evidence for this Unit was sampled on the following date/s	Internal verifier's signature	Internal verifier's name

This Unit has been subject to an admin check in keeping with the centre's IV strategy.

Date of admin check	Internal verifier's signature	Internal verifier's name

Unit completion confirmed

Internal verifier's name	
Internal verifier's signature	
Date completed	