

About this Unit

This standards is about administering appointments. You will need to be able to receive and record information for appointments. Based on this information you will then need to schedule appointments and communicate appointments to others. This standard also covers receiving individuals for appointments. You will need to communicate with individuals effectively and check their details. Because of the sensitivities involved you will need to maintain their dignity and confidentiality. You will also need to record the outcome of appointments. The outcome may be for example: follow up appointment, discharge, add to waiting list or admission. For this unit you will need a good awareness of records administration and the importance of data quality. You will also need to adhere to organisational protocols and procedures.

Users of this standards will need to ensure that practice reflects up-to-date information and policies.

Your **knowledge and understanding** will be specifically related to legal requirements and codes of practice and conduct applicable to your job, and the NHS Knowledge and Skills Framework. This will relate to your work activities; the job you are doing, and the setting, eg in hospital and community, domiciliary, residential care, and the individuals you are working with.

Values — the values underpinning this standards are embedded within the 2009 NHS Code of Conduct for Health Care Support Workers. These are stated in full within the Assessment Strategy and Guidance document for the awards.

Key Words and Concepts — a glossary of definitions, key words and concepts used in this standards is contained in the Assessment Strategy and Guidance document.

In occupational standardss it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standardss, may be used in a very particular way. **You should read the Assessment Strategy and Guidance document before you begin working with the standardss and refer to it if you are unsure about anything in the Unit.**

Specific Evidence Requirements for the Unit

It is essential that you adhere to the Evidence Requirements for this Unit

SPECIFIC EVIDENCE REQUIREMENTS FOR THIS UNIT
Simulation:
<ul style="list-style-type: none"> ◆ Simulation is NOT permitted for any part of this Unit. ◆ The following forms of evidence ARE mandatory: ◆ Direct Observation: Your assessor or expert witness must observe you in real work activities. Their confirmation of your practice will provide evidence for a significant amount of the performance criteria in this Unit. For example, how you allocate appointments by applying protocols and booking rules. ◆ Professional discussion: Describes your actions in a particular situation and reflect on the reason(s) why you practice that way. For example, the organisational procedures and protocols for administering appointments.
Competence of performance and knowledge could also be demonstrated using a variety of evidence from the following:
<ul style="list-style-type: none"> ◆ Reflective Account: These are written pieces of work which allow you to reflect on the course of action you took in a specific situation to identify any learning from the piece of work and to describe what you might do differently in the light of your new knowledge. ◆ Questioning/professional discussion: May be used to provide evidence of knowledge, legislation, policies and procedures which cannot be fully evidenced through direct observation or reflective accounts. In addition your assessor/mentor or expert witness may also ask questions to clarify aspects of your practice. ◆ Expert Witness: A designated expert witness, eg a senior member of staff, may provide a direct observation of your practice, or record a professional discussion they have held with you on a specific piece of practice. ◆ Witness Testimony: Can be a confirmation or authentication of the activities described in your evidence which your assessor or mentor has not seen. ◆ Products: These can be any record that you would normally use within your normal role, eg you should not put confidential records in your portfolio; they can remain where they are normally stored and be checked by your assessor and internal verifier. ◆ Prior Learning: You may be able to use recorded prior learning from a course of training you have attended within the last two years. Discussion on the relevance of this should form part of your assessment plan for each Unit. ◆ Simulation: There may be times when you have to demonstrate you are competent in a situation that does not arise naturally through your work role, eg dealing with violent or abusive behaviour. The Evidence Requirements in each Unit provide specific guidance regarding the use of simulation.
GENERAL GUIDANCE
<ul style="list-style-type: none"> ◆ Prior to commencing this Unit you should agree and complete an assessment plan with your assessor which details the assessment methods you will be using, and the tasks you will be undertaking to demonstrate your competence. ◆ Evidence must be provided for ALL of the performance criteria, ALL of the knowledge. ◆ The evidence must reflect the policies and procedures of your workplace and be linked to current legislation, values and the principles of best practice within the Health Care sector. This will include the National Service Standards for your areas of work. ◆ All evidence must relate to your own work practice.

KNOWLEDGE SPECIFICATION FOR THIS UNIT

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

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

You need to provide evidence for ALL knowledge points listed below. There are a variety of ways this can be achieved so it is essential that you read the ‘knowledge evidence’ section of the Assessment Guidance.

You need to show that you know, understand and can apply in practice:	Enter Evidence Numbers
1 Current legislation, policies, guidelines and codes of practice in relation to administering appointments.	
2 Organisational procedures and protocols for administering appointments.	
3 The importance and reasons for maintaining confidentiality.	
4 The importance and reasons for validating and entering timely, accurate and relevant data.	
5 Information required for appointments.	
6 How to maintain up-to-date information for appointments.	
7 The booking rules in your organisation.	
8 How to allocate appointments.	
9 The different types of appointments.	
10 How to ensure appointments are suitable for the individual.	
11 How and when to communicate appointments to individuals.	
12 How to liaise with other staff to make appointments.	
13 How to manage the pending appointments.	
14 How to manage duplicate records.	
15 The function and use of the minimum data set.	
16 The importance of maintaining the dignity of the individual and treating them with respect.	
17 How to communicate effectively with individuals and others.	
18 How to deal with difficult situations that may arise.	
19 The records procedures for individuals with appointments.	
20 The action to take if records are missing.	
21 The administrative outcomes of appointments.	
22 How to reconcile appointment lists.	

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Performance Criteria		DO	RA	EW	Q	P	WT	PD
		1	Obtain the required information for appointments.					
2	Check the appointments against the master and take the appropriate action where there are differences.							
3	Record the necessary referral information.							
4	Pass the referral to relevant others for prioritising within the required timescale.							
5	Allocate appointments by applying protocols and booking rules.							
6	Book appointments or put the individual on the appropriate list.							
7	Communicate the status of appointments to individuals and others.							
8	Monitor appointments availability and ensure effective use of appointments to meet local and national priorities.							
9	Reschedule and reallocate appointments and communicate new information to the individual and relevant others.							
10	Ensure all the relevant records are available for the appointment.							
11	Take the appropriate action if records are missing.							
12	Receive and correctly identify individuals at reception.							
13	Deal with individuals sensitively and handle any difficulties that they may have with procedures with care and respect.							
14	Check the individual's current details against the master and where necessary update the information.							
15	Record the individual's arrival and pass the records through to the relevant person.							
16	Where necessary, record the administrative outcome of appointments.							
17	Reconcile appointments by balancing attendance against scheduled appointments.							
18	Process records correctly in accordance with the appointment outcome.							
19	Maintain the confidentiality of information at all times.							

DO = Direct Observation

RA = Reflective Account

Q = Questions

EW = Expert Witness

P = Product (Work)

WT = Witness Testimony

PD = Professional Discussion

To be completed by the candidate

I SUBMIT THIS AS A COMPLETE UNIT

Candidate's name:

Candidate's signature:

Date:

To be completed by the assessor

It is a shared responsibility of both the candidate and assessor to claim evidence, however, it is the responsibility of the assessor to ensure the accuracy/validity of each evidence claim and make the final decision.

I CERTIFY THAT SUFFICIENT EVIDENCE HAS BEEN PRODUCED TO MEET ALL THE ELEMENTS, PCS AND KNOWLEDGE OF THIS UNIT.

Assessor's name:

Assessor's signature:

Date:

Assessor/Internal verifier feedback

To be completed by the internal verifier if applicable

This section only needs to be completed if the Unit is sampled by the internal verifier

Internal verifier's name:

Internal verifier's signature:

Date: