

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.

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Performance criteria

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

You must be able to:

- P1 access information on benefits, allowances, entitlements and debt management to ensure your own understanding is thorough and up to date
- P2 support the **individual** and **key people** to check the benefits and allowances they may be entitled to, accessing additional expertise where necessary
- P3 support the individual and key people to identify the information and advice that will help them **manage their financial affairs**
- P4 encourage the individual to communicate which sources of information and advice will help them manage their financial affairs
- P5 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
- P6 support the individual to access information and advice that suits their abilities and preferences in managing their financial affairs
- P7 access specialist help on particular financial matters where you are unable to support the individual
- P8 support the individual to provide feedback to people and organisations where their information and advice does not meet the needs of the individual

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You must be able to:

- P9 work in ways that promote **active participation** when supporting the individual to manage their financial affairs
- P10 support the individual to complete relevant documents for accessing benefits, entitlements and specialist financial expertise
- P11 work with the individual and **others** to identify the options they have for managing and monitoring their financial affairs
- P12 support the individual to select the methods and services best suited to them
- P13 support the individual to use the methods and services they have selected
- P14 agree with the individual how they will review the effectiveness of the methods and services they have used
- P15 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

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- P16 support the individual to make any changes to the methods and services they have used to manage and monitor their financial affairs
- P17 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**

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Knowledge and understanding

You need to know and understand:

Rights

- K1 legal and work setting requirements on equality, diversity, discrimination and rights
- K2 your role in promoting individuals' rights, choices, wellbeing and active participation
- K3 your duty to report any acts or omissions that could infringe the rights of individuals
- K4 how to deal with and challenge discrimination
- K5 the rights that individuals have to make complaints and be supported to do so

You need to know and understand:

Your practice

- K6 legislation, statutory codes, standards, frameworks and guidance relevant to your work, your work setting and the content of this standard
- K7 your own background, experiences and beliefs that may have an impact on your practice
- K8 your own roles, responsibilities and accountabilities with their limits and boundaries
- K9 the roles, responsibilities and accountabilities of others with whom you work
- K10 how to access and work to procedures and agreed ways of working
- K11 the meaning of person-centred/child centred working and the importance of knowing and respecting each person as an individual
- K12 the prime importance of the interests and well-being of the individual
- K13 the individual's cultural and language context
- K14 how to build trust and rapport in a relationship
- K15 how your power and influence as a worker can impact on relationships
- K16 how to work in ways that promote active participation and maintain individuals' dignity, respect, personal beliefs and preferences
- K17 how to work in partnership with individuals, key people and others
- K18 how to manage ethical conflicts and dilemmas in your work
- K19 how to challenge poor practice
- K20 how and when to seek support in situations beyond your experience and expertise

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You need to know and understand:

Theory

- K21 the nature and impact of **factors that may affect the health, wellbeing and development of individuals** you care for or support
- K22 theories underpinning our understanding of human development and factors that affect it

Personal and professional development

You need to know and understand:

- K23 principles of reflective practice and why it is important

Communication

You need to know and understand:

- K24 factors that can affect communication and language skills and their development in children, young people and adults
- K25 methods to promote effective communication and enable individuals to communicate their needs, views and preferences

Health and Safety

You need to know and understand:

- K26 your work setting policies and practices for monitoring and maintaining health, safety and security in the work environment
- K27 practices for the prevention and control of infection in the context of this standard

Safe-guarding

You need to know and understand:

- K28 the responsibility that everyone has to raise concerns about possible harm or abuse, poor or discriminatory practices
- K29 indicators of potential harm or abuse
- K30 how and when to report any concerns about abuse, poor or discriminatory practice, resources or operational difficulties
- K31 what to do if you have reported concerns but no action is taken to address them

Handling information

You need to know and understand:

- K32 legal requirements, policies and procedures for the security and confidentiality of information
- K33 legal and work setting requirements for recording information and producing reports
- K34 principles of confidentiality and when to pass on otherwise confidential information

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Specific to this NOS

You need to know and understand:

- K35 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
- K36 methods of supporting the individual to express their needs and preferences about their finances and any problems they are having in managing them
- K37 how to provide the individual with accessible information about finances, benefits and allowances
- K38 how to support the individual to complete benefit/claim forms
- K39 sources of advice and support on financial assistance and management
- K40 methods of keeping records and details of payments and receipts
- K41 methods of budgeting that are acceptable and appropriate for the individual
- K42 methods of managing debts and making payments
- K43 methods of storing money safely that are acceptable to the individual

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 well-being. 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 well-being 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

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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

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