
Overview

This standard focuses on the process and range of skills required to make an effective assessment of the client's needs. It establishes appropriate boundaries for making a safe assessment and sets out a duty of care to seek further advice or refer the client on if the case is beyond the practitioner's remit or capability. Users of this standard will need to ensure that practice reflects up to date information and policies.

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Performance criteria

You must be able to:

- P1 respect the client's privacy and dignity throughout the assessment and ensure they are as comfortable as possible
- P2 position the client for effective access and to minimise risk of injury to self and discomfort to the client
- P3 conduct the assessment in a manner which encourages the effective participation of the client and meets their particular requirements
- P4 support the client to identify significant aspects of their lives and use this as part of the assessment
- P5 react to any safety implications during the assessment and take appropriate action
- P6 ensure that the assessment process is safe and that it complies with professional and legal requirements
- P7 use appropriate assessment methods to formulate a treatment plan
- P8 seek advice and support from an appropriate source when the needs of the client and the complexity of the case are beyond your own remit or capability
- P9 halt the assessment process at the request of the client
- P10 inform the client when additional information is required and obtain their consent to obtain the information
- P11 ensure the information obtained for and during the assessment is sufficient to formulate the treatment plan
- P12 ensure records are signed, dated and include all relevant details and any supporting information

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Knowledge and understanding

You need to know and understand:

- K1 the professional standards and code of conduct for your discipline
- K2 the role of the professional (regulatory) body setting the rules and ethical standards of your discipline
- K3 the rules, ethical standards and codes of conduct of your profession and how they apply to your own practice
- K4 why it is important to keep your understanding of professional rules and codes of conduct up to date
- K5 how to balance your own responsibilities as a professional with any contractual or other requirements of any organisation within which you work
- K6 current relevant health and safety legislation and how it applies to your own work role
- K7 legislation relating to obtaining, storing and using information
- K8 legislation relating to supplying services
- K9 the importance of keeping your understanding of legislation up to date
- K10 how relevant legislation impacts on your work
- K11 the roles and functions of the principal agencies with whom you work
- K12 how to obtain information from the principal agencies with whom you may be working
- K13 why it is important to respect the rights of clients
- K14 the extent of your own remit as a practitioner and the limits of your responsibilities
- K15 how your own role relates to that of other professionals within the principal agencies
- K16 the organisational requirements and restrictions relating to the use of resources
- K17 the range of resources and options available to meet the client's needs
- K18 how to achieve effective communication through observation, sensitive questioning, listening and touch
- K19 how to adapt vocabulary, pace and tone of speaking to meet the needs of the client
- K20 what forms of verbal and non-verbal communication are available and how to use these positively
- K21 what signals can be used to check the understanding of the client and how to interpret them
- K22 how to position self and client to encourage communication
- K23 how to recognise and overcome barriers to communication
- K24 why it is important to encourage the client (and any companion(s)) to ask questions, seek advice and express any concerns
- K25 the nature of a professional relationship and how to develop it with clients
- K26 how to respond to conflicting advice which clients may receive from

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- different practitioners
- K27 why it is important to reflect on your own practice and identify any development needs
- K28 how to evaluate the effectiveness of your own actions and learn from experience
- K29 the information available on effective healthcare and how to evaluate and use this information within your own practice
- K30 how the models and concepts in your area of practice have evolved and developed, how they change with time and the similarities and differences between different versions
- K31 how to develop links with other healthcare providers and the protocols for doing this
- K32 how to recognise the limits of your own knowledge and competence and the importance of not exceeding these
- K33 why it is important to acknowledge your own limitations and when there may be a need to refer the client on to other healthcare practitioners
- K34 the importance of recognising and maintaining the client's legal and ethical rights to confidentiality
- K35 how to balance the client's rights against your responsibility to others
- K36 what to take into account when passing on information about clients
- K37 what the procedures and requirements on confidentiality, security and transmission of information are for your organisation and for any other organisation that you may need to contact regarding a client
- K38 the ways in which confidentiality may be breached and how to prevent their occurrence
- K39 the different forms of consent and the circumstances in which these may apply
- K40 the guidance given by your professional body on consent and when written consent should be obtained
- K41 why it is important to ensure that clients have been given sufficient information to give or refuse consent
- K42 who holds responsibility for gaining consent and when this should be done
- K43 how consent may be obtained for clients who are unable to give the consent themselves and who has the right to give this consent
- K44 the policies on consent, including any specific requirements under contractual agreements for your organisation and any other organisation you may need to contact regarding a client
- K45 why it is important to protect client confidentiality
- K46 how to keep records in order to protect confidentiality and security of information
- K47 how to keep records so that an audit can be undertaken
- K48 how to record all the necessary information in a format suitable for further use
- K49 who has the right of access to information held on records

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- K50 the audit cycle
- K51 why it is important to acknowledge and respect an individual's rights and dignity and ways of doing this
- K52 the nature of disability and your role and responsibilities in working with those who have disabilities
- K53 how an individual's abilities and disabilities may affect the nature and form of help and support and the manner in which you provide it
- K54 what circumstances may indicate a need for the presence of a third party
- K55 who may act as a companion for the client and how to interact with them
- K56 what your legal and ethical responsibilities are in relation to the client's health and safety
- K57 how to maintain your practice in line with health and safety legislation
- K58 how to be supportive to the client (and any companion(s)) whilst managing time effectively
- K59 how to obtain information on commonly encountered diseases and on medications and their side effects
- K60 how to recognise those occasions when acupuncture may be appropriate and/or may complement other healthcare which the client is receiving
- K61 how to recognise conditions for which acupuncture alone would be ill advised and for which the client should seek advice from other sources
- K62 the circumstances when you may choose not to accept a client or to cease treating a client:
 - K62.1 acupuncture is unlikely to succeed
 - K62.2 the client does not want acupuncture
 - K62.3 you do not wish to provide acupuncture
- K63 the circumstances when you must not accept a client:
 - K63.1 acupuncture is contra-indicated
 - K63.2 you do not have the requisite experience or expertise
 - K63.3 other healthcare options are needed as a matter of urgency
- K64 the range, purpose and limitations of different methods, which may be used for different clients with different needs
- K65 how to determine the most appropriate method(s) for different clients and their particular needs
- K66 how to tailor treatment appropriately for each individual
- K67 how to assess the appropriateness of self-care strategies for the client
- K68 relevant anatomy for safe needling practice
- K69 relevant microbiology for safe clinical practice
- K70 relevant physiology, pathology and pharmacology for any clinical healthcare practitioner
- K71 relevant anatomy, physiology, pathology and pharmacology in order to recognise circumstances:
 - K71.1 for which acupuncture is appropriate
 - K71.2 where acupuncture must be used with caution
 - K71.3 for which acupuncture is contra-indicated
 - K71.4 for which acupuncture is inappropriate

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- K72 how to select, prepare and use a range of equipment and materials that may be needed to assess the client
- K73 how to interpret the client's initial approach and manner and identify their needs
- K74 how to select and use different assessment methods effectively
- K75 the amount of time which each assessment method is likely to take to establish the client's needs
- K76 the importance of respecting the client's privacy and dignity and affording them as much comfort as possible during assessment
- K77 how to establish valid and reliable information about the client determine their priority of need
- K78 how to deal with and utilise any inconsistent information gained during assessment
- K79 how to determine the meaning and significance of the information given by the client

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Additional Information

Links to other NOS

This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004):

Dimension: HWB6 Assessment and treatment planning

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