

**Unit Title:** Develop, maintain and use records and reports  
**Sector unit number:** LM 502  
**Level:** 4  
**Credit value:** 3  
**Guided learning hours:** 23  
**Unit reference number:** A/504/2198

## Unit purpose and aim

The purpose of this unit is to develop knowledge, understanding and skills in developing, maintaining and using records and reports.

Learning Outcomes	Assessment Criteria	Teaching Content
<p><b>The Learner will:</b></p> <p>1 Understand the legal and organisational requirements for recording information and providing reports</p>	<p><b>The Learner can:</b></p> <p>1.1 Specify own responsibilities and those of <b>others</b> when recording information and producing reports.</p> <p>1.2 Explain the legal requirements and <b>agreed ways of working</b> for the security and confidentiality of information.</p>	<p><b>Others</b> may include:</p> <ul style="list-style-type: none"> <li>• Team members and colleagues</li> <li>• Other professionals</li> </ul> <p><b>Agreed ways of working</b> – policies and procedures where they exist</p>
<p>2 Be able to prepare professional records and reports that meet legal requirements, and agreed ways of working</p>	<p>2.1 Support <b>individuals</b> to participate in the preparation of reports.</p> <p>2.2 Produce accurate and coherent records and reports that can be understood by those who have a right to see them.</p> <p>2.3 Maintain accurate, complete, retrievable and up to date records.</p> <p>2.4 Ensure that records and reports comply with legal and organisational requirements.</p> <p>2.5 Explain how to balance the tension between confidentiality and openness in records and reports.</p>	<p>An <b>individual</b> is someone requiring care or support</p>

Learning Outcomes	Assessment Criteria	Teaching Content
	2.6 Use information communication technology (ICT) systems for the collection and storage of information.  2.7 Use ICT that supports information exchange within and across disciplines and organisations.	
3 Be able to use records and reports to inform judgements and decisions	3.1 Clarify the accuracy of records and reports with individuals and others.  3.2 Respond to feedback from those who receive records and reports.  3.3 Demonstrate the use of facts and evidence based opinions within records and reports.  3.4 Evaluate how own records and reports provide evidence for the basis of judgements and decisions.	

## Assessment

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Units need to be assessed in accordance with Skills for Care's QCF Assessment Principles.

Assessment decisions for competence based learning outcomes (e.g. those beginning with 'Be able to') must be made in a real work environment by an occupationally competent assessor. Any knowledge evidence integral to these learning outcomes may be generated outside of the work environment but the final assessment decision must be within the real work environment.

This unit is competence based. This means that it is linked to the candidate's ability to competently perform a range of tasks connected with their work. This unit may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. This unit requires workplace assessment of occupational competence.

Competence based assessment must include direct observation as the main source of evidence.

## Guidance on assessment and evidence requirements

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OCR does not stipulate the mode of delivery for the teaching of the content of this unit. Centres are free to deliver this unit using any mode of delivery that meets the needs of their candidates. Centres should consider the candidates' complete learning experience when designing learning programmes.

## Details of relationship between the unit and national occupational standards

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This unit has been developed by Skills for Care in Partnership with Awarding Organisations. It provides a key progression route between education and employment (or further study/training leading to employment). It is directly relevant to the needs of employers and relates to national occupational standards developed by Skills for Care.

As such, the unit may provide evidence for the following national occupational standards in health and social care developed by Skills for Care.

SCDHSC0434

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Administrative Guide for Vocational Qualifications*' (A850).

This unit is a shared unit. It is located within the subject/sector classification system 01.3 Health and Social Care.