

Unit Title:	Support individuals to manage their finances
Unit sector reference:	HSC 3023
Level:	3
Credit value:	3
Guided learning hours:	20
Unit accreditation number:	D/601/7904

Unit purpose and aim

This unit is aimed at those working in a wide range of settings. It provides the learner with the knowledge and skills required to support individuals to manage and review their financial affairs, in accordance with their needs and preferences.

Learning Outcomes The learner will:	Assessment Criteria The learner can:	Exemplification
1 Know how to access information and advice about financial affairs	1.1 Identify sources of information and advice about methods and services for managing personal finances 1.2 Identify sources of information and advice about benefits and allowances 1.3 Describe the role of others who may be involved in supporting individuals to manage their own finances 1.4 Describe how and when to access specialist expertise about managing financial affairs 1.5 Explain how to access advice on safeguarding against financial abuse	Methods and services for managing personal finances may include those for <ul style="list-style-type: none"> • budgeting • tracking income and expenditure • making payments • keeping money safely • managing debts • keeping financial records Others may include <ul style="list-style-type: none"> • family • friends • advocates • professionals • others who are important to the individual's well-being
2 Be able to provide support for individuals to manage their finances	2.1 Identify legislation, codes of practice and agreed ways of working that apply when providing support to manage financial affairs 2.2 Work with the individual to identify the skills they have for managing their own finances	Agreed ways of working will include policies and procedures where these exist and will indicate where others need to be involved An individual is someone requiring care or support Active participation is a way of working that recognises an

Learning Outcomes The learner will:	Assessment Criteria The learner can:	Exemplification
	2.3 Identify an individual's preferred methods and services for managing their finances 2.4 Provide support for managing finances in a way that promotes active participation and safeguards the individual 2.5 Contribute to records and reports about finances in line with agreed ways of working	individual's right to participate in the activities and relationships of everyday life as independently as possible; the individual is regarded as an active partner in their own care or support, rather than a passive recipient
3 Be able to contribute to applying for financial assistance	3.1 Provide support for an individual to check the benefits and allowances to which they are entitled 3.2 Contribute to completing forms and paperwork to apply for benefits or entitlements in a way that promotes active participation	
4 Be able to contribute to reviewing support for managing finances	4.1 Agree with the individual the process and criteria for measuring the effectiveness of methods, services and support for managing finances 4.2 Work with the individual to evaluate methods, services and support for managing finances 4.3 Agree with the individual any changes to methods, services and support for managing finances 4.4 Provide feedback to an organisation or agency about the effectiveness of financial information or support 4.5 Explain the importance of providing feedback to organisations or agencies about any shortfalls in their financial services or support	

Assessment

This unit needs to be assessed in line with the Skills for Care and Development QCF Assessment principles.

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.

Assessment decisions for competence based learning outcomes (eg 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.

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

For this unit, learning outcomes 2, 3 and 4 must be assessed in a real work environment.

Guidance on assessment and evidence requirements

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.

National occupational standards (NOS) mapping/signposting

This unit has been developed by Skills for Care and Development in Partnership with Awarding Organisations. It is directly relevant to the needs of employers and relates to national occupational standards developed by Skills for Care and Development.

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

HSC 345

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk

Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

Functional Skills standards can be viewed at <http://www.qcda.gov.uk/15565.aspx>

Functional Skills Standards					
English		Mathematics		ICT	
Speaking and Listening	✓	Representing		Use ICT systems	✓
Reading	✓	Analysing		Find and select information	
Writing	✓	Interpreting		Develop, present and communicate information	

Additional information

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.