

Assessment of patient/client clinical competencies

Name:	Role: Band 5/6/7
Base:	Date initial training completed:

Competency Statement:

The participant demonstrates clinical knowledge and skill in assessment without assistance and/or direct supervision (level 3 - see level descriptors). Assessment in practice must be by a Registered Health Care Professional who can demonstrate competence at level 4 or above.

Performance Criteria	Assessment Method	Level achieved	Date	Assessor/self assessed
The Participant will be able to:				
1. Demonstrate the knowledge and skill in assessing the patient / client				
a) Obtain details of the individual's prior health status and circumstances to inform assessment, in accordance with the individual's current situation	observation			
b) Use appropriate questions to explore, clarify and confirm any unusual or ambiguous information	observation			
c) Record the information clearly and accurately in a systematic and logical manner that clearly shows the history of the individual's condition	observation			
d) Treat all information provided to you as confidential in accordance with organisational policy and practice	observation			
e) Respect the individual's privacy, dignity, wishes and beliefs	observation			
f) Check and confirm that the third party is able to provide you with relevant information and has the authority to provide you with information about the individual (when present)	observation			
2. Demonstrate ability to establish an individual's functional capabilities				
a) Conduct the assessment systematically and thoroughly using appropriate methods and equipment to gather as full a picture as possible of the individual's capabilities and any	observation			

Performance Criteria	Assessment Method	Level achieved	Date	Assessor/self assessed
deficits				
b) Minimise any unnecessary discomfort and encourage the individual to participate as fully as possible in the process	observation			
c) Monitor and record any changes in the individual's health status and respond promptly to any signs of deterioration	observation			
d) Use the information available at the time to develop a justifiable judgment with regard to: <ul style="list-style-type: none"> • the functional capabilities of the individual • the implications of any changes in the health status of the individual • the nature, severity and extent of any deficits in the individual's functional capabilities 	observation			
e) Recognise accurately potential signs of abuse and report them promptly to the appropriate person, in line with policy	observation			
f) Form an accurate and justifiable evaluation of the risks to the individual making use of any protocols, guidelines or advice to inform your decision making	observation			
g) Arrive at a judgment in an appropriate timeframe and refer the individual on to the appropriate pathway	observation			
h) Seek additional support and advice from other practitioners as necessary to arrive at a satisfactory judgment	observation			
i) Exchange information promptly with other practitioners involved in providing care programmes for the individual	observation			
j) Discuss the outcome of your assessments with the individual, encouraging them to ask questions and confirm their understanding	observation			
k) Maintain full, accurate and legible records of assessment	observation			

Source: Case Management competencies framework NHS Modernisation Agency 2005)

