

**Home
and
Community Care**

**National
Service Standards**

Instrument

(Pilot draft January 1997)

Please complete:

Agency name:

State:

Before attempting to complete the instrument, you should read both the instrument and the guidelines.

The next page contains a list of the questions which are contained in the instrument. You may wish to tear this page out to use as a guide while completing the instrument, to assist you in determining the breadth of information to be included in response to each question.

Objective 1

What proportion of your consumers were formally assessed when they first began receiving services from your agency?

How does your agency prioritise need?

How does your agency allocate available resources?

How can your agency demonstrate that access to services by special needs groups occurs on a non-discriminatory basis?

How does your agency ensure that consumers in receipt of other services are not discriminated in obtaining further services from your agency?

How does your agency ensure that a consumer's previous refusal of a service does not prejudice future attempts to access your agency's services?

Objective 2

How does your agency ensure that consumers are aware of their rights and responsibilities?

How does your agency ensure that consumers are informed about available services?

How does your agency ensure that consumers are informed about the basis of service provision, including any changes that may have to occur?

Objective 3

What information on the level of need in your community does your agency collect?

How can you show that your agency builds this information into service development?

How can your agency show that as a consequence of service evaluation, services are changed or modified?

How can your agency show that it involves consumers in service management?

How can you show that your agency practices accountable management?

How does your agency ensure that staff are appropriately skilled/competent to carry out services for consumers?

Objective 4

How does your agency ensure that it regularly monitors consumer needs? How often does your agency conduct formal reviews of clients and how is the time for formal review determined?

How do you inform clients and staff of the individually tailored service or care which clients should receive?

What proportion of your consumers have an individually tailored and negotiated plan?

How does your agency ensure that consumers' cultural needs are taken into account when providing care/support?

Describe the referral process used by your agency, including factors taken into consideration, and any follow up action taken by your agency.

How does your agency cooperate with other agencies in order to meet consumer needs? Where appropriate - How is case coordination determined in your service system - how can you show that this happens?

Objective 5

How does your agency ensure that consumers are informed of your privacy and confidentiality procedures and how does it ensure that consumers understand their rights in relation to these procedures?

How does your agency ensure that the release of consumer information occurs with the consent of the consumer or their advocate or legal guardian?

Does your agency enable consumers to access their personal information upon request?

Objective 6

How does your agency ensure that consumers are aware of the complaints process?

How can your agency demonstrate that consumer complaints are dealt with fairly, promptly, confidentially, and without retribution?

How can your agency demonstrate that services have been modified in response to upheld complaints? Please give examples.

How can your agency demonstrate that it offers assistance to help with the conflict about a service between a client and his/her primary carer?

Objective 7

How does your agency ensure that consumers know of their rights to use an advocate and have access to an advocate of their choice?

How does your agency ensure that advocates are involved in representing the rights and concerns of consumers?

The HACC National Service Standards Instrument is intended to provide a means by which HACC funded agencies assess their performance against the 27 service standards. Rating options of met, partly met and not met are set against each standard. These guidelines were developed to provide assistance to agencies in completing the Instrument.

As the HACC target group includes frail aged people, younger people with disabilities, and the primary carers of both of these groups of people, the word 'consumer' in the HACC National Service Standards can be taken to refer to any or all of these groups of people.

Where agency documentation provides appropriate answers against the performance information required in the Instrument, you should attach these documents and refer to them in your answers. Some questions may be answered by reference to agency policy. Attach this document and indicate the relevant pages and sections. In addition, indicate how these policies operate in practice.

In line with principles regarding the protection of privacy and confidentiality, client records should not be individually identified in completing this Instrument.

It is recognised that agencies must operate within the resources made available to them by Governments and this will be taken into account in monitoring the implementation of these standards.

IF YOUR AGENCY IS ONE IN WHICH HACC FUNDING RELATES TO ONLY SOME OF YOUR CONSUMERS it is only necessary that your answers relate to the procedures you have in place for these consumers. However, if service provision to HACC funded and non-HACC funded consumers is not readily distinguished answers may relate to both groups without discrimination between the two.

Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.1 Consumer Outcome: Formal assessment occurs for each consumer.

When consumers first begin using HACC funded services they should undergo a comprehensive formal assessment to determine their need and priority in relation to other consumers.

What proportion of your consumers were formally assessed when they first began receiving services from your agency?

Clients may have received a formal assessment by your agency or by another agency. Of the clients currently receiving your services what percentage of clients had their needs assessed either by your agency or by an agency with which you cooperate in coordinated case management.

To answer this question, calculate the number of clients new to your agency who were formally assessed (either by your agency or by an agency with which you cooperate in coordinated case management) divided by the total number of new clients and multiply by 100.

To answer this question you may need to define a time frame to which the figures relate.

You may wish to indicate what proportion of new clients were assessed in the last 6 months (or some other more appropriate time period),
or,

you may wish to use a limit relating to the number of clients accessing the service. For example, you may prefer to indicate what proportion of the last 100 clients accessing your service received a comprehensive assessment.

Please specify how you derived the figures you have cited.

In some cases there may be clients who have used your agency's services or who have applied to your agency but they may not yet have been assessed. If this is the case, indicate the approximate length of time between when a client applies to the agency or begins receiving services and when assessment occurs.

If your agency is not one which routinely conducts comprehensive assessments of consumer need for all your clients please indicate why by giving a description of the service you provide and the process by which consumers access your service.

Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.1 Consumer Outcome: Formal assessment occurs for each consumer.

What proportion of your consumers were formally assessed when they first began receiving services from your agency?

Number of consumers assessed _____ x 100 = _____ %

Total number of consumers serviced _____

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Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.2 Consumer Outcome: Consumers are allocated available resources according to prioritised need.

Describe the criteria your agency uses to determine the way in which decisions are made about the amount of assistance provided to each consumer. This should include how your agency prioritises need based on the information gained in assessment and how it allocates resources in response to this.

How does your agency prioritise need?

Describe the assessment tools used by your agency, attaching appropriate forms where available. Indicate whether these assessment tools take into account the consumer's:

- severity of disability, including the difficulties they experience with tasks of daily living;
- requirements for medical or nursing help;
- safety of their physical environment;
- geographical isolation;
- financial disadvantage;
- cultural background;
- social contacts; and
- the availability of a carer.

Describe the information you record about the carer's level of need. Comment on what information you collect on:

- condition of the carer physically;
- condition of the carer psychologically;
- condition of the carer financially;
- the social support available to the carer; and
- the carer's competing commitments such as employment.

Comment on how you use your assessment criteria to prioritise consumer need and how these criteria are suitable to your agency's target group.

How does your agency allocate available resources?

In describing how your agency allocates resources you should show how you go about determining differences in service delivery between consumers. This should include details about:

- the amount of service provided given the assessment outcome;
- the response time you allow between referral and service delivery or between initial assessment and service delivery depending on the clients needs;
- the criteria used to determine which consumers are refused service or put on a waiting list; and
- if applicable, how often waiting lists are reviewed in order to reprioritise consumer access to services.

Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.2 Consumer Outcome: Consumers are allocated available resources according to prioritised need.

How does your agency prioritise need?

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How does your agency allocate available resources?

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Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

- 1.3 Consumer Outcome:** Access to services by consumers with special needs is decided on a non-discriminatory basis.
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Your agency should be able to demonstrate that the needs of special needs groups are taken into account in the process and planning of service delivery.

How can your agency demonstrate that access to services by special needs groups occurs on a non-discriminatory basis?

If you are able to compare the profile of your client base with the profile of persons likely to be in need of assistance in the community (through the use of demographic profiles) you may show how these profiles match for:

- a) non-English speaking background people and, where appropriate, sub-groups within the larger ethnic groups;
- b) people of Aboriginal or Torres Strait Islander descent;
- c) rurally isolated people;
- d) people with dementia; and
- e) financially disadvantaged people.

Describe how you allocate resources or adapt service delivery to facilitate access to services by these special needs groups.

Other agencies in your region may provide services to special needs groups. If so, indicate how you coordinate with them in the delivery of services to these groups, for example, through referral or case coordination. In addition, if your agency does not target the special groups listed here please provide an explanation of why this is not done.

Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.3 Consumer Outcome: Access to services by consumers with special needs is decided on a non-discriminatory basis.

How can your agency demonstrate that access to services by special needs groups occurs on a non-discriminatory basis?

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Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

- 1.4 Consumer Outcome:** Consumers in receipt of other services are not discriminated in receiving additional services.
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The services a client receives from your agency should be provided on the basis of their relative need and in consideration of the resources available in your agency to satisfy their need. How your agency decides what mix or amount of services it should provide to consumers was reported by you under standard 1.2.

Standard 1.4 examines the issue of how your agency determines what services a client should receive under the circumstance in which they are receiving services from other agencies. While duplication of services may be inappropriate, a demonstrable means of dealing with clients already in receipt of services is an important issue in relation to consumer access.

How does your agency ensure that consumers in receipt of other services are not discriminated in obtaining further services from your agency?

Indicate how your agency responds to information that clients are receiving services from other agencies.

Where clients are refused a service from your agency on the basis of the delivery of services to them by other agencies, describe how this refusal is deemed to be appropriate.

This question may be of limited relevance to agencies whose clients are dealt with under case management. Please indicate if this is the case.

Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.4 Consumer Outcome: Consumers in receipt of other services are not-discriminated in receiving additional services.

How does your agency ensure that consumers in receipt of other services are not discriminated in obtaining further services from your agency?

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Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

- 1.5 Consumer Outcome:** Consumers who reapply for services are assessed with needs being prioritised.
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Consumers who approach your agency for assistance may be refused service or, in the course of their service delivery, conditions may change such that your agency may refuse them further service. Similarly, consumers themselves may refuse a service offered or provided to them.

How does your agency ensure that a consumer's previous refusal of a service does not prejudice future attempts to access your agency's services?

To answer this question show how agency policy supports the right of consumers to refuse a service and describe how this is reflected in practice, including how your agency reassures consumers they can come back to the agency after they have refused or ended a service.

Show how your agency reassures consumers they can come back to the agency after your agency has refused them a service. Describe the procedures your agency has in place to ensure that consumers understand the reason for refusal of a service by your agency.

Where appropriate, indicate what practices occur to inform clients of waiting list procedures after immediate delivery of a service has been refused.

Objective 1: ACCESS TO SERVICES:

To ensure that each consumer's access to a service is decided only on the basis of relative need.

1.5 Consumer Outcome: Consumers who reapply for services are assessed with needs being prioritised.

How does your agency ensure that a consumer's previous refusal of a service does not prejudice future attempts to access your agency's services?

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Objective 2: INFORMATION AND CONSULTATION

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

2.1 Consumer Outcome: Consumers are aware of their rights and responsibilities.

According to the HACC National Service Standard Principles consumers should have the HACC Statement of Rights and Responsibilities made available to them and agencies should explain these rights and responsibilities when necessary.

Further, when explaining rights and responsibilities to consumers, agencies should be sensitive to any special linguistic, cultural, physical or intellectual requirements.

How does your agency ensure that consumers are aware of their rights and responsibilities?

Outline the procedures your agency has in place to ensure that consumers, including carers, are aware of their rights and responsibilities and are reminded of these.

Where your agency has a policy relating to this standard indicate what this is and show how this is implemented in agency practices.

Where available, attach examples of fliers or brochures your agency uses to inform clients of their rights. Give examples of how your agency seeks to overcome the difficulties that some clients may have in hearing about or understanding their rights.

Describe how your agency's staff and volunteers are made aware of issues relating to consumer rights and responsibilities.

Objective 2: INFORMATION AND CONSULTATION

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

2.1 Consumer Outcome: Consumers are aware of their rights and responsibilities.

How does your agency ensure that consumers are aware of their rights and responsibilities?

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Objective 2: INFORMATION AND CONSULTATION

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

2.2 Consumer Outcome: Consumers are aware of services available.

According to the HACC National Service Standard Principles, consumers should be informed of their choices for HACC support, including those provided by other relevant agencies.

How does your agency ensure that consumers are informed about available services?

Detail the means by which your agency provides information to consumers about the services available from your agency and, where relevant, from other agencies. Where available, attach agency brochures or information booklets.

Describe how your agency regularly reminds consumers of what services are available and how often this is done.

Indicate how you accommodate consumer choice of staff and service strategies within the constraints of available resources.

Describe how your agency keeps relevant staff and volunteers abreast of the service options available to consumers and the services offered by other agencies.

Give examples of how your agency seeks to overcome the difficulties that some clients may have in learning about services available. Include description of what provision is made for people of non-English speaking backgrounds and Aboriginals and Torres Strait Islanders.

Objective 2: INFORMATION AND CONSULTATION

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

2.2 Consumer Outcome: Consumers are aware of services available.

How does your agency ensure that consumers are informed about available services?

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Objective 2: INFORMATION AND CONSULTATION

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

2.3 Consumer Outcome: Consumers are informed of the basis of service provision, including changes that may occur.

This standard requires that consumers be informed of how his or her needs are assessed and of how service delivery/care plans are developed. It also requires that consumers are informed about the circumstances in which a service may no longer be provided or may need to change.

How does your agency ensure that consumers are informed about the basis of service provision, including any changes that may have to occur?

Indicate the way in which your agency informs clients of how decisions were made about the service which is provided to them. This should relate to decisions about the types of services they will receive and the length of time they will be receiving them.

Include, where applicable, how clients are informed of the fees and charges which your agency applies.

Describe how you allow consumers to have a voice in determining their service provision.

Detail the procedures your agency follows when a change is made to the service being provided to a consumer, for instance, whether you give notice in writing of the proposed reduction or end of a service with an accompanying explanation. Comment on whether you inform consumers of the option for appeal before the service is changed or ended, whether you inform consumers of any available alternative services, or whether you inform consumers whose service is due to cease of the circumstances in which your agency may again be able to assist him or her.

Describe how your agency responds to a request from a consumer to make a change to the service they receive. Detail the processes that occur and give an estimate of how quickly your agency is able to respond to such requests.

Objective 2: INFORMATION AND CONSULTATION

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

2.3 Consumer Outcome: Consumers are informed of the basis of service provision, including changes that may occur.

How does your agency ensure that consumers are informed about the basis of service provision, including any changes that may have to occur?

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Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

- 3.1 Consumer Outcome:** Consumers receive appropriate services provided through the processes of ongoing planning, monitoring and evaluation of services.
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This standard requires that you demonstrate how your agency responds to community need. There are three components to this: evaluation of community need, identification of the implications of this need for service development, and implementation of service changes in response to this identified need.

What information on the level of need in your community does your agency collect?

For this standard you should provide detail on what information on the level of need in your community your agency collects. This may include how you evaluate the characteristics and needs of consumers, including carers. It may include how your agency estimates the amount of unmet need in your region, taking into account services provided by other agencies in the region. It may also include how your agency makes use of the information gathered in the process of assessment, reassessment, through consumer surveys, or through analysis of information on those to whom you have refused service.

If your agency does not undertake analysis of the level of need for services in the community please explain why this is so.

How can you show that your agency builds this information into service development?

This standard asks that you demonstrate how your agency builds information on community need into service development plans. Provide detail on how information on consumer need is used to monitor service provision, distribution and service gaps. You may wish to detail how your agency estimates future need for its services.

Minutes from meetings, or planning workshops in which these issues were discussed may be an information source used to answer this question.

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.1 Consumer Outcome: Consumers receive appropriate services provided through the processes of ongoing planning, monitoring and evaluation of services.

What information on the level of need in your community does your agency collect?

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How can you show that your agency builds this information into service development?

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Additional question overleaf...

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

- 3.1 Consumer Outcome:** Consumers receive appropriate services provided through the processes of ongoing planning, monitoring and evaluation of services (cont'd).
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How can your agency show that as a consequence of service evaluation, services are changed or modified?

To answer this question, give examples of new or modified projects or shifts in resources which were made in response to a need identified during service evaluation. For example, if you identified a group growing in need, indicate what implications this had for service delivery. You may also wish to outline the plans your agency has for adapting to the future needs of consumers.

Provide detail on the review system your agency uses to measure the effectiveness of service changes.

If your agency has identified a community need but has been unable to respond to it please explain why this is so.

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.1 Consumer Outcome: Consumers receive appropriate services provided through the processes of ongoing planning, monitoring and evaluation of services (cont'd).

How can your agency show that as a consequence of service evaluation, services are changed or modified?

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Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.2 Consumer Outcomes: Consumers receive services from agencies that adhere to accountable management practices.

This standard requires that you show how your agency practices accountable management, including how it involves consumers in service management.

How can your agency show that it involves consumers in service management?

Consumer participation in planning and decision making may occur in a number of ways. For example, by having consumer representation on management committees, by routinely asking consumers for feedback, verbally or in writing, about the service and recognising this input in service development, or by publishing management plans and inviting consumers to comment or participate. This standard asks that you describe how consumer participation occurs in your agency.

How does your agency take into account such factors as consumer disability, isolation or communication difficulties in seeking their involvement in service management?

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.2 Consumer Outcomes: Consumers receive services from agencies that adhere to accountable management practices.

How can your agency show that it involves consumers in service management?

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Additional question overleaf...

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

- 3.2 Consumer Outcomes:** Consumers receive services from agencies that adhere to accountable management practices (cont'd).
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How can you show that your agency practices accountable management?

This standard also requires that you show evidence that your agency practices accountable management. This question is directed at aspects of organisation level management rather than at the level of management of services to individual clients. At the broadest level, show how your agency monitors its activities and evaluates whether it is meeting its organisational objectives, including those set out in your Funding and Service Agreement.

Some of the management policies and practices which you may wish to detail (if they have not been covered elsewhere) include:

- how your agency deals with fees, means testing, donations.
- how you inform the community and government authorities of the operation of the agency including the services which you provide.
- details of compliance with the relevant State/Territory and Commonwealth award and legislative requirements.
- how your agency ensures that subcontractors enlisted by your agency provide quality services to consumers.
- how your agency informs staff of their roles, the administration of the agency and accountability for their work.
- how your agency makes sure that information about positions of authority within the agency is publicly available and provided to consumers.
- where relevant, how your management committee is selected and operates.
- how your agency ensures that premises occupied by it are of an appropriate standard (for example, facilitates access for people with disabilities, meets state regulations and leasing requirements).

Documentation which may be usefully cited to reply to this standard include: your Funding and Service Agreement and records indicating how this is being met; financial reports; annual reports; where applicable, licenses and other legal requirements such as those relating to Occupational Health and Safety; and outcomes of other reviews or accreditation processes your agency may have undertaken.

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.2 Consumer Outcomes: Consumers receive services from agencies that adhere to accountable management practices (cont'd).

How can you show that your agency practices accountable management?

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Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.3 Consumer Outcome: Consumers receive services from appropriately skilled staff.

How does your agency ensure that staff are appropriately skilled/competent to carry out services for consumers?

Given the services which your agency provides and the tasks which your staff undertake in relation to those services, describe how your agency ensures that staff are adequately skilled or competent.

Provide detail on how your selection procedures and your staffing profile are tailored to the services your agency provides and type of clientele you service. Where available, cite relevant policies and selection criteria.

Quality in service delivery is enhanced in agencies which promote and practice a policy of continuing/in-service education and training for staff following an assessment of their needs. This training should be relevant to staff roles and the needs of the agency's clients including those with dementia, memory loss and similar disorders, and should enable staff to understand the legal responsibilities associated with their work.

Comment on how your agency undertakes analysis of the training needs of staff.

Provide detail on what training is made available, with comment on how you ensure that staff:

- remain abreast of current issues in service delivery, for example, infection control, occupational health and safety;
- are aware of issues relevant to non-English speaking background people, Aboriginal or Torres Strait Islanders, rurally isolated people, and financially disadvantaged people;
- are trained in dealing with people with dementia, memory loss and similar disorders; and
- are aware of their responsibilities in regard to client rights.

Describe how training is made accessible to staff.

Indicate what proportion of your staff have received training and how regularly staff knowledge and skills are updated in this way.

If your agency makes use of volunteers, describe how the training needs of this group are met.

Objective 3: EFFICIENT AND EFFECTIVE MANAGEMENT

To ensure that consumers receive the benefit of well-planned, efficient and accountable management.

3.3 Consumer Outcome: Consumers receive services from appropriately skilled staff.

How does your agency ensure that staff are appropriately skilled/competent to carry out services for consumers?

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Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY

To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

- 4.1 Consumer Outcome:** Each consumer receives ongoing assessment (formal and informal) that takes all support needs into account.
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HACC funded agencies have a responsibility to promote and practice a policy of ongoing client assessment.

How does your agency ensure that it regularly monitors consumer needs? How often does your agency conduct formal reviews of clients and how is the time for formal review determined?

Describe the processes, both formal and informal, that your agency has in place to monitor consumer needs. Show how results of reassessment are incorporated into service delivery or care plans. Outline the procedures your agency uses to take action on reassessments when changes are required to service delivery or care plans. For instance, how is this information made available to the relevant staff, and how are the changes monitored to ensure they are appropriate for the consumer.

In commenting on how your agency ensures that it regularly monitors consumer needs, detail how your agency decides on the appropriate length of time between formal reassessments. Give an indication of how many of your clients are formally reassessed in your determined reassessment interval. Comment on how fully the support needs of the client are assessed in this process.

Apart from formal reassessments, how does your agency ensure that the needs of consumers are regularly heard and can effect service delivery? Comment on how frequently clients are informally reassessed. If informal reassessment forms a substantial component of assessment in your agency, how does your agency ensure that staff understand the processes by which this information informs service delivery and their role in participating in this.

Similarly, for formal reassessment, how does your agency ensure that staff understand the reassessment policy and associated procedures. If your agency does not undertake formal reassessment of clients please indicate why and outline how the changing needs of clients are taken into account.

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.1 Consumer Outcome: Each consumer receives ongoing assessment (formal and informal) that takes all support needs into account.

How does your agency ensure that it regularly monitors consumer needs? How often does your agency conduct formal reviews of clients and how is the time for formal review determined?

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Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY

To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

- 4.2 Consumer Outcome:** Each consumer has a service delivery/care plan which is tailored to individual need and outlines the service he or she can expect to receive.
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In line with the client centred objective of the HACC service standards, service delivery or care plans should be tailored to individual client need through a consultative process which takes their needs and preferences into account as far as possible. This should include delivery of services to clients when and as they need them.

How do you inform clients and staff of the individually tailored service or care which clients should receive?

Service delivery or care plans should be clearly outlined to consumers. Detail how your agency provides this information to consumers.

Describe the process in which these service delivery or care plans are discussed with consumers before implementation, and how consumers are given options, within service constraints, from which to choose.

Describe how staff are kept informed of the changing service needs of clients.

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.2 Consumer Outcome: Each consumer has a service delivery/care plan which is tailored to individual need and outlines the service he or she can expect to receive.

How do you inform clients and staff of the individually tailored service or care which clients should receive?

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Additional question overleaf...

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.2 Consumer Outcome: Each consumer has a service delivery/care plan which is tailored to individual need and outlines the service he or she can expect to receive (cont'd).

What proportion of your consumers have an individually tailored and negotiated plan?

What proportion of clients currently receiving your services have an individually tailored and negotiated plan?

Express this as the number of clients who have an individually tailored and negotiated plan divided by the total number of consumers accessing your service and multiply by 100.

To answer this question you may need to define a time frame to which the figures relate.

You may wish to indicate what proportion of clients have an individually tailored and negotiated plan in the last 6 months (or some other more appropriate time period), or,

you may wish to use a limit relating to the number of clients accessing the service. For example, you may prefer to indicate what proportion of the last 100 clients accessing your service received an individually tailored and negotiated plan. Please specify how you derived the figures you have cited.

In circumstances where you feel that it is not appropriate for your agency to have a formal service delivery or care plan with its clients, for example, because of the transient nature of client contact, these circumstances should be explained.

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.2 Consumer Outcome: Each consumer has a service delivery/care plan which is tailored to individual need and outlines the service he or she can expect to receive (cont'd).

What proportion of your consumers have an individually tailored and negotiated plan?

Number of consumers with a plan _____ x 100 = _____ %
Total number of consumers serviced

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Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.3 Consumer Outcome: Consumers cultural needs are addressed.

An important principle in the provision of HACC funded services is to provide those services in a way that is sensitive to the consumer's cultural, linguistic, and religious needs and background.

How does your agency ensure that consumer's cultural needs are taken into account when providing care/support?

Describe the procedures your agency has in place for identifying the special cultural needs of consumers.

Describe how your agency takes into account these cultural needs, including, where appropriate, descriptions of special protocols or procedures that you have in place for people of non-English speaking background, and Aboriginal and Torres Strait Islanders. For example, information available in languages other than English, use of interpreters, staff training in cultural issues. You may also like to include specific examples of how care plans have been designed in consultation with clients to ensure that their cultural needs have been addressed in the provision of care/support. These should be presented without identifying individual clients.

Indicate how your agency informs staff of the individual client's needs and preferences are in relation to their cultural background.

If your agency does not provide services tailored to certain cultural groups, indicate why this is not done or how you coordinate with other agencies that target these groups.

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.3 Consumer Outcome: Consumers' cultural needs are addressed.

How does your agency ensure that consumers' cultural needs are taken into account when providing care/support?

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Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.4 Consumer Outcome: The needs of consumers with dementia, memory loss and similar disorders are addressed.

People with dementia, memory loss and similar disorders and their carers have additional needs to be met if they are to function at their optimum level and ensure the best possible quality of life.

How does your agency ensure that the special needs of consumers with dementia, memory loss and similar disorders and their carers are taken into account?

Describe how your agency takes into account the additional needs of clients with dementia, memory loss and similar disorders and their carers, including, where appropriate, descriptions of special protocols or procedures that you have in place for this group. Comment on the how the additional needs of this group are taken into account in the development of care plans, what steps are taken to identify advocates or persons known and trusted by the person with dementia or similar illness and how this person or persons are used in the ongoing process of care planning and delivery. Among the protocols you should describe are those staff use to refer people suspected of having dementia for appropriate assessment.

Describe how your agency accommodates for people of non-English speaking backgrounds who have dementia, for example, the use of interpreters with an understanding of this group.

Describe the ways in which your staff and volunteers are informed of the additional needs of this group of consumers and how their knowledge and skills are kept up to date in this regard.

Provide details of how the carers of those with dementia or similar illness are informed of the additional care options available to them, including respite and local support groups and describe how the needs of carers are taken into account when planning services for the person with dementia.

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.4 Consumer Outcome: The needs of consumers with dementia, memory loss and similar disorders are addressed.

How does your agency ensure that the special needs of consumers with dementia, memory loss and similar disorders and their carers are taken into account?

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Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.5 Consumer Outcome: Consumers receive services which include appropriate coordination and referral processes.

In the process of assessment, reassessment, or informal reassessment your agency may identify client needs which the agency itself cannot fulfil. With the clients permission, HACC funded agencies should coordinate with other agencies in meeting the service needs of clients.

Describe the referral process used by your agency, including factors taken into consideration, and any follow up action taken by your agency.

Describe the referral process used in your agency, including how consumers are involved and informed of this process. Where available, refer to agency policy and demonstrate how this is translated into agency procedure by providing examples of referral forms and detailing how these are used.

Outline how client preferences are taken into account in the referral process. For instance, how your agency deals with cases in which clients do not want involvement from another specific agency.

Detail the factors that your agency takes into account when considering referral of clients. These should include how you decide on their eligibility for services, whether you make an assessment of their relative need, and how you assess the appropriateness to the client of your services in relation to other available services.

Provide detail on what information you keep on other agencies that would be appropriate for client referral.

Outline the processes followed by agency staff in following up on referrals. These may include descriptions of established procedures you have for linking with and referring to other agencies and procedures for keeping in touch with clients during these processes. If they are established, how does your agency link with and participate in agency/service provider networks. Describe the documentation your agency keeps on responses to referrals, including referrals from other agencies and referrals from your own agency to others.

Comment on the time taken between referral of clients from other agencies until assessment and service delivery in your agency.

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.5 Consumer Outcome: Consumers receive services which include appropriate coordination and referral processes.

Describe the referral process used by your agency, including factors taken into consideration, and any follow up action taken by your agency.

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Additional question overleaf...

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.5 Consumer Outcome: Consumers receive services which include appropriate coordination and referral processes (cont'd).

How does your agency cooperate with other agencies in order to meet consumer needs? Where appropriate - How is case coordination determined in your service system - how can you show that this happens?

If there is more than one agency providing care to your clients, describe how these services are coordinated. How is case management decided? How are the assessments and care plans of other agencies taken into account and responsibility for service delivery made clear to all parties?

If your agency needs to reduce or end a service, does consultation with other relevant agencies occur before the service is reduced or ended? Where further referral is necessary are all agencies informed?

Objective 4: CO-ORDINATED, PLANNED AND RELIABLE SERVICE DELIVERY
To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her specific ongoing needs.

4.5 Consumer Outcome: Consumers receive services which include appropriate coordination and referral processes (cont'd).

How does your agency cooperate with other agencies in order to meet consumer needs? Where appropriate - How is case coordination determined in your service system - how can you show that this happens?

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Objective 5: PRIVACY, CONFIDENTIALITY AND ACCESS TO PERSONAL INFORMATION

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to personal information held by the agency.

- 5.1 Consumer Outcome:** Consumers are informed of the privacy and confidentiality procedures and understand their rights in relation to these procedures.
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According to the HACC National Service Standards consumers' privacy and confidentiality should be secured in a number of ways and consumers should be made aware of these provisions.

How does your agency ensure that consumers are informed of your privacy and confidentiality procedures and how does it ensure that consumers understand their rights in relation to these procedures?

The first standard under this objective refers to the consumers right to be informed of privacy and confidentiality procedures and their rights in relation to privacy and confidentiality procedures. What are your agency's policies in relation to this standard? Indicate how your agency provides this information to clients and their carers. Include information about how your agency makes this information accessible to groups with communication difficulties.

Comment on how your agency informs staff and volunteers of client privacy and confidentiality issues. Indicate whether this information covers the following areas:

- secure storage of personal and service delivery records, including data obtained during assessment;
- limiting access to each consumer's records without hindering the consumer's own access to those records;
- safe and secure destruction of consumer records in line with State/Territory requirements; and
- conducting interviews with clients in private and other measures for ensuring that details of clients remain confidential.

Objective 5: PRIVACY, CONFIDENTIALITY AND ACCESS TO PERSONAL INFORMATION

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to personal information held by the agency.

5.1 Consumer Outcome: Consumers are informed of the privacy and confidentiality procedures and understand their rights in relation to these procedures.

How does your agency ensure that consumers are informed of your privacy and confidentiality procedures and how does it ensure that consumers understand their rights in relation to these procedures?

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Objective 5: PRIVACY, CONFIDENTIALITY AND ACCESS TO PERSONAL INFORMATION

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to personal information held by the agency.

5.2 Consumer Outcome: Consumers have signed confidentiality release forms

The release of information to other agencies about your agency's clients should only occur with their consent or, where relevant, the consent of their advocate or legal guardian.

How does your agency ensure that the release of consumer information occurs with the consent of the consumer or their advocate or legal guardian?

Please state whether it is ever necessary for your agency to pass on personal information to another agency or person about consumers, for example, when making referrals. If this is the case, how do you ensure that consumers agree that the agency may pass on information about them in each circumstance?

What are the procedures that your agency follows governing the exchange of information with other agencies?

What provisions are made for the release of consumer information in the case of an emergency?

Some of the protocols which you might outline under this standard include: those protocols in regard to obtaining written permission from consumers who are unable to sign; protocols in relation to stripping identifiers from data for service planning; and protocols in relation to informing client's that their files may be shared with another organisation.

Provide detail on the number of consumers who have signed confidentiality release forms expressed as a percentage of the number of consumers for whom personal information was released.

If your agency gains the consent of consumers to release information how do you inform them and give them a choice of who this information is going to.

Objective 5: PRIVACY, CONFIDENTIALITY AND ACCESS TO PERSONAL INFORMATION

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to personal information held by the agency.

5.2 Consumer Outcome: Consumers have signed confidentiality release forms

How does your agency ensure that the release of consumer information occurs with the consent of the consumer or their advocate or legal guardian?

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Objective 5: PRIVACY, CONFIDENTIALITY AND ACCESS TO PERSONAL INFORMATION

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to personal information held by the agency.

5.3 Consumer Outcome: Consumers are able to gain access to their personal information.

Each consumer of a HACC service should be able to gain access to personal information about them which is held by the agency. Similarly, a person authorised by the consumer or the consumer's legal guardian should be able to gain access to this information, within the constraints of relevant law.

Does your agency enable consumers to access their personal information upon request?

Outline or cite your agency's policy in relation to allowing consumer's access to their personal information.

Describe how your agency informs clients of what information your agency holds about them and their right to access this information.

Describe the circumstances in which a request for information would be denied.

If your agency does not have a formal policy, the nature of the records kept by your agency should be described.

Objective 5: PRIVACY, CONFIDENTIALITY AND ACCESS TO PERSONAL INFORMATION

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to personal information held by the agency.

5.3 Consumer Outcome: Consumers are able to gain access to their personal information.

Does your agency enable consumers to access their personal information upon request?

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Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

6.1 Consumer Outcome: Consumers are aware of the complaints process.

How does your agency ensure that consumers are aware of the complaints process?

In detailing how your agency ensures that consumers are made aware of the complaints process, attach relevant handouts and cite relevant policy documents or client handbooks where appropriate.

Describe how your agency makes sure that members of different special needs groups are included in this process (including those from non-English speaking backgrounds and those who are Aboriginal or Torres Strait Islander).

How often does your agency remind consumers of your complaints process?

Describe how your agency informs consumers of your agency's internal processes for handling complaints and the external processes available within the State or Territory.

Consumers should be aware of which person in the agency they can approach regarding a complaint, including what position of authority they hold.

In addition, discuss the means by which your agency ensures that consumers are aware of methods for informally having their concerns resolved.

Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

6.1 Consumer Outcome: Consumers are aware of the complaints process.

How does your agency ensure that consumers are aware of the complaints process?

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Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

- 6.2 Consumer Outcome:** Each consumer's complaint about a service, or access to a service is dealt with fairly, promptly, confidentially and without retribution.
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HACC funded agencies should, according to this standard, promote and practice a policy for dealing with and monitoring complaints, including complaints about access.

How can your agency demonstrate that consumer complaints are dealt with fairly promptly confidentially and without retribution?

Describe your agency's complaints policy and process. This description of your complaints policy and process should indicate that your agency's complaints process is fair. For instance, the person affected by a decision should be fully informed of all facts against him or her; a person affected by a decision should be given an opportunity to put his or her case; and the decision maker should act fairly and without bias.

Give an indication of how quickly your agency acts on complaints which it receives. Processes for ensuring confidentiality and continued non-discriminatory treatment should be explained.

Staff training in dealing with complaints should also be detailed.

If your agency has not received any formal complaints, you should give examples of how your agency goes about the resolution of less formally stated concerns expressed by consumers.

Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

6.2 Consumer Outcome: Each consumer's complaint about a service, or access to a service is dealt with fairly, promptly, confidentially and without retribution.

How can your agency demonstrate that consumer complaints are dealt with fairly, promptly, confidentially, and without retribution?

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Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

6.3 Consumer Outcome: Services are modified as a result of "upheld" complaints.

How can your agency demonstrate that services have been modified in response to upheld complaints? Please give examples.

If your agency has received any formal complaints and upheld them, examples of the action taken in response to these should be outlined, including how the relevant consumers were informed about the outcome of the complaint and the process through which the agency sought further feedback from the consumer about the outcome and the complaint process.

When a complaint has been upheld demonstrate how your agency has reviewed its access and/or service delivery practices with a view to making improvements in the service and avoiding any future similar complaints.

Provide detail on the time frame in which this service modification occurred, from first reporting of the complaint to modification of the service.

If your agency has received no formal complaints, provide details of changes in service delivery made in response to consumer's informally raised concerns and the speed with which this occurs.

Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

6.3 Consumer Outcome: Services are modified as a result of "upheld" complaints.

How can your agency demonstrate that services have been modified in response to upheld complaints? Please give examples.

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Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

- 6.4 Consumer Outcome:** Each consumer receives assistance, if requested, to help with the resolution of conflict about a service that arises between the frail elderly person or younger person with a disability and his/her carer.
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The term 'carer' refers to the primary carer of the frail elderly person or younger person with a disability. Service providers have a responsibility to mediate and attempt to negotiate a solution if conflict about a service arises between the carer and the frail elderly person or younger person with a disability. For example, the primary carer may wish to have some hours of respite care in which the person they care for attends centre day care. The person being cared for may not wish to do this.

How can your agency demonstrate that it offers assistance to help with the conflict about a service between a client and his/her primary carer?

This standard requires that you provide detail of your agency's policies and procedures with regard to dealing with situations of conflict about a service between a frail elderly person or younger person with a disability and their carer.

Outline the circumstances under which your agency would intervene in a conflict between a consumer and his or her primary carer.

Outline what type of action your agency might take eg. referral to or provision of mediation/conflict resolution services or support services or whether your agency informs both parties to a dispute of other alternatives for conflict resolution.

Comment on how your agency policy on this matter is appropriate and available to different special needs groups, for example, consumers with dementia and their carers.

If your agency has specific protocols concerning, for example, abuse or conflict situations, these should be noted.

If you do not have a formal policy covering this situation, describe the action your agency would take or has taken in the past.

Objective 6: COMPLAINTS AND DISPUTES

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints.

- 6.4 Consumer Outcome:** Each consumer receives assistance, if requested, to help with the resolution of conflict about a service that arises between the frail elderly person or younger person with a disability and his/her carer.

How can your agency demonstrate that it offers assistance to help with the conflict about a service between a client and his/her primary carer?

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Objective 7: ADVOCACY

To ensure that each consumer has access to an advocate of his or her choice.

- 7.1 **Consumer Outcome:** Consumers know of their rights to use an advocate.
- 7.2 **Consumer Outcome:** Each consumer has access to an advocate of his/her choice.
- 7.3 **Consumer Outcome:** Consumers know about advocacy services - where they are and how to use them.
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An advocate is a person who, with the authority of the consumer, represents the consumer's interests. According to the HACCC National Service Standards principles, consumers have a right to choose to use an advocate. This choice is one which should be actively encouraged and supported by agencies. Aspects to be considered in supporting consumers are included in the consumer outcomes listed above.

How does your agency ensure that consumers know of their rights to use an advocate and have access to an advocate of their choice?

Describe the means by which your agency ensures that consumers receive and understand information about their rights to use an advocate, attaching relevant documents and handouts where available.

Comment on the links your agency has established with advocacy groups in the area who may assist consumers.

How does your agency inform consumers of how to access advocacy services. What details about advocacy agencies does your agency supply to consumers, for example, names and phone numbers of relevant agencies or information on how to use advocacy services. What action does your agency take to periodically to remind all consumers about advocacy, and in particular, does your agency take steps to convey this information to consumers who may appear to have a particular need for it.

Indicate whether your agency makes it clear to consumers that they are free to ask a family member, friend or other person to advocate on their behalf, and that the agency would welcome the involvement of this advocate.

Does your agency ensure that consumers are aware that they can change their nominated advocate at any time?

If your agency provides advocacy services for consumers describe how you make clients aware of their rights and responsibilities in relation to your services and how they are made aware of their right to choose another advocate.

Objective 7: ADVOCACY

To ensure that each consumer has access to an advocate of his or her choice.

7.1 Consumer Outcome: Each consumer has access to an advocate of his/her choice.

7.2 Consumer Outcome: Consumers know of their rights to use an advocate.

7.3 Consumer Outcome: Consumers know about advocacy services - where they are and how to use them.

How does your agency ensure that consumers know of their rights to use an advocate and have access to an advocate of their choice?

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Objective 7: ADVOCACY

To ensure that each consumer has access to an advocate of his or her choice.

7.4 Consumer Outcome: The agency involves advocates in respect to representing the interests of the consumer.

The agency should involve advocates in any consultation or decision making processes concerning a consumer, and in any other communication between the agency and the consumer, where that is the wish of that consumer.

How does your agency ensure that advocates are involved in representing the rights and concerns of consumers?

In addition to informing consumers of their rights to use an advocate, how does your agency promote their involvement with your agency? What are your agency's policies and procedures on the involvement of advocates (cite relevant agency policy or client handbook, etc.)?

Describe the measures your agency takes in informing and training staff on involving advocates.

Objective 7: ADVOCACY

To ensure that each consumer has access to an advocate of his or her choice.

7.4 Consumer Outcome: The agency involves advocates in respect to representing the interests of the consumer.

How does your agency ensure that advocates are involved in representing the rights and concerns of consumers?

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Agency Review Summary Form

Date of review:

Name of agency:

Contact person and phone no.:

Participants:

Overall rating for the agency against the National Service Standards

Please add up the scores against each of the individual standards and place the total in the space below.

Score: _____

On the basis of information gathered in this quality appraisal, I would rate this agency against the HACC National Service Standards as:

- Exemplary
- Meets to a good standard
- Meets to a minimal or basic standard
- Fails to meet the HACC National Service Standards

Comments:

Date of next review:

Signatures of committee member(s)/Funding authority representative

Forward action plan

If more work is needed on a particular standard in order for it to be fully met, please describe what your agency will do and by when.

Tasks to be done	Time Frame	Person to complete task
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Where assistance is needed to fully implement a standard detail what this assistance is and where it should come from.

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