

Clinical Task Instruction

Delegated Task

D-SP01: Client education – financial assistance

Scope and objectives of clinical task

This CTI will enable the Allied Health Assistant to:

- provide standard education/information including supporting resources (where available) outlining the options for financial assistance.
- provide client-specific information/education as defined by the health professional in the delegation instruction.

VERSION CONTROL

Version: 2.1

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Document custodian:	Chief Allied Health Officer, Allied Health Professions' Office of Qld.	Review date:	24/12/2024
Acknowledgements:	Cairns and Hinterland Hospital and Health Service		

The CTI reflects best practice and agreed process for conduct of the task at the time of approval and should not be altered. Feedback, including proposed amendments to this published document, should be directed to AHPOQ at: allied_health_advisory@health.qld.gov.au.

This CTI must be used under a skill sharing framework implemented at the work unit level. The framework is available at: <https://www.health.qld.gov.au/ahwac/html/calderdale-framework.asp>

Please check <https://www.health.qld.gov.au/ahwac/html/clintaskinstructions.asp> for the latest version of this CTI.

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Requisite training, knowledge, skills and experience

Training

- Completion of CTI D-WTS01 When to stop.
- Mandatory training requirements relevant to Queensland Health/Hospital and Health Service (HHS) clinical roles are assumed knowledge for this CTI.

Clinical knowledge

- The following content knowledge is required by an AHA delivering this task:
 - a basic understanding of the financial assistance options available for clients, as relevant to the client's health condition and the local healthcare service.
 - local contact information for Centrelink including relevant online information and eligibility criteria:
 - government allowances and entitlements
 - accessing superannuation entitlements.
 - the local financial support client education resources and tools available, including laptop computer and websites, posters and handouts.
- The knowledge requirements will be met by the following activities:
 - complete the training program/s (listed above).
 - reviewing the Learning resource.
 - receiving instruction from an allied health professional in the training phase.

Skills or experience

- The following skills or experience are not identified in the task procedure but support the safe and effective performance of the task and are required by an AHA delivering this task:
 - if relevant for the local service, competence or ability to attain competence in presenting information to clients from linguistically and culturally diverse backgrounds, or those who require the use of a communication aid.

Safety and quality

Client

- The AHA will apply CTI D-WTS01 When to stop at all times.
- In addition, the following potential risks and precautions have been identified for this clinical task and should be monitored carefully by the AHA during the task:
 - clients requesting information beyond what is available in the standard education resource and this CTI, should be advised that the relevant health professional will be contacted for follow-up. AHAs must not attempt to provide information that sits outside their scope of clinical knowledge and training. Offering information based on personal opinion or experience is not appropriate in a clinical setting. This includes advice or opinion on client's eligibility or entitlements for financial assistance programs. If the client requests additional support to engage with financial assistance programs, liaise with the delegating health professional.

Equipment, aids and appliances

- Nil

Environment

- Ensure the environment is managed appropriately for effective communication e.g. minimise distraction, close door/curtain.

Performance of clinical task

1. Delegation instructions

- Receive the delegated task from the health professional.
- The delegating health professional should clearly identify the parameters for delivering the clinical task to the specific client, including any variance from the usual task procedure and information/education to be delivered. This may include:
 - factors impacting the delivery of information such as hearing or sight problems, English as a second language, neurological problems impacting communication.
 - specific information to be adjusted or highlighted or discussed during the education session.

2. Preparation

- Collect or print the required education/information resource/s as indicated in the delegation instruction.

3. Introduce task and seek consent

- The AHA introduces him/herself to the client.
- The AHA checks three forms of client identification: full name, date of birth, **plus one** of the following: hospital unit record (UR) number, Medicare number, or address.
- The AHA describes the task to the client. For example:
 - “The (delegating health professional) has asked me to provide you with some information on possible options for financial assistance”.
- The AHA seeks informed consent according to the Queensland Health Guide to Informed Decision-making in Health Care, 2nd edition (2017).

4. Positioning

- The client's position during the task should be:
 - in a comfortable position where they can read printed resources (where relevant) and converse with the AHA, either seated in a chair or sitting up in bed.
- The AHA's position during the task should be:
 - in a position where they can read the information resource and converse with the client. Ideally, the AHA should be facing the client and at eye level. Positioning such that the client can clearly see the AHA is particularly important for clients with hearing or other communication problems.

5. Task procedure

- Explain and demonstrate (where applicable), the task to the client.
- Check the client has understood the task and provide an opportunity to ask questions.
- The task comprises the following steps:
 1. Where possible, move to a quiet area or close curtains/door to limit distractions.
 2. Provide the financial support information/education resource to the client.
 3. Present information/education including any variants to the standard information requested by the delegating health practitioner e.g. a summary of the resource.
 4. Discuss any particular strategies on the information brochure that have been highlighted by the delegating health professional e.g. client to contact government department and/or employer to check eligibility status, process for lodging an enquiry.
- During the task:
 - check that the client understands the information provided by asking if they have any questions and by gauging whether the client appears confused or concerned about the information.
 - note any questions or concerns that the client has that are not covered by the printed resource or by the AHA's training and indicate to the client that these questions will be provided to the relevant health professional for follow-up.
 - monitor for adverse reactions and implement appropriate mitigation strategies as outlined in the Safety and quality section above including CTI D-WTS01 When to stop.
- At the conclusion of the task:
 - ensure the client is comfortable and safe.

6. Document

- Document the outcomes of the task in the clinical record, consistent with relevant documentation standards and local procedures. Include the topic or title of the written education/information resource/s provided.

7. Report to the delegating health professional

- Provide comprehensive feedback to the health professional who delegated the task. Include any questions the client raised that could not be addressed, observation of client understanding, and any feedback on the information provided by the client that may be relevant to the care plan.

References and supporting documents

- Queensland Health (2015). Clinical Task Instruction D-WTS01 When to stop. Available at: <https://www.health.qld.gov.au/ahwac/html/clintaskinstructions.asp>
- Queensland Health (2017). Guide to Informed Decision-making in Health Care (2nd edition). Available at: https://www.health.qld.gov.au/_data/assets/pdf_file/0019/143074/ic-guide.pdf

Assessment: performance criteria checklist

D-SP01: Client education – financial assistance

Name:

Position:

Work Unit:

Performance criteria	Knowledge acquired	Supervised task practice	Competency assessment
	<i>Date and initials of supervising AHP</i>	<i>Date and initials of supervising AHP</i>	<i>Date and initials of supervising AHP</i>
Demonstrates knowledge of fundamental concepts required to undertake the task.			
Obtains all required information from the delegating health professional, and seeks clarification if required, prior to accepting and proceeding with the delegated task.			
Completes preparation for the task including collecting relevant information resources.			
Introduces self to the client and checks client identification.			
Describes the purpose of the delegated task and seeks informed consent.			
Positions self and client appropriately to complete the task and ensure safety.			
Delivers the task effectively and safely as per delegated instructions and CTI procedure. a) Clearly explains the task, checking the client's understanding. b) Provides client with information/education resource/s, highlighting relevant key points or strategies. c) During the task, maintains a safe clinical environment and manages risks appropriately. d) Provides feedback to the client on performance during and at completion of the task.			
Documents the outcomes of the task in the clinical record, consistent with relevant documentation standards and local procedures.			
Provides accurate and comprehensive feedback to the delegating health professional.			

Comments:

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Record of assessment competence:

Assessor name:		Assessor position:		Competence achieved:	/ /
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Scheduled review:

Review date:	/ /	
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Client education - financial assistance: Learning resource

Background information/key principles

- Clients accessing healthcare may be experiencing financial stress due to the effects of illness on their/their carer's ability to work, costs of treatment or time away from their home location.
- Financial stress will impact the health and wellbeing of the client and their family.
- Financial assistance is potentially available from a number of sources, but clients may be unaware of the assistance available or be uncertain how to find out more information on their entitlements. Examples include the Department of Veterans' Affairs, National Disability Insurance Scheme, Cancer Council, Medical Aids Subsidy Scheme.
- Clients are encouraged to seek advice from financial counsellors as appropriate to their circumstances.
- Clients are encouraged to test their eligibility with government departments e.g. Centrelink.
- When relevant, clients are encouraged to contact their employer and superannuation fund to determine their entitlements e.g. leave (sickness, annual, and long service) along with any insurance and income protection.
- Clients should be encouraged to make enquiries regarding their eligibility, rather than making assumptions about their status.

Example education/information resources relevant to the task

The AHA must understand and be confident explaining the content in the following education/information resources as relevant to the local healthcare setting:

- Australian Government: Australian Taxation Office
 - early access to your super.
Available at: <https://www.ato.gov.au/individuals/super/withdrawing-and-using-your-super/early-access-to-your-super/>
- Australian government: Services Australia
 - payments for people living with an illness, injury or disability
Available at: <https://www.humanservices.gov.au/individuals/subjects/payments-people-living-illness-injury-or-disability>
 - Closing the gap – PBS co-payment measure
 - disability support pension information.
Available at: <https://www.servicesaustralia.gov.au/individuals/services/centrelink/disability-support-pension>
- Financial Counsellors' Association of Queensland. Can assist clients to locate appropriately qualified financial counsellors in their local area. Available at: <https://faq.com.au/> National Debt Helpline ph: 1800 007 007
- Other relevant local financial assistance options and associated resources for the local healthcare setting. For example:
 - community care programs run by local charities or organisations.

- Cancer Council Queensland. Available at: <https://cancerqld.org.au/get-support/cancer-support-services/>
- PBF Australia. Spinal cord injury gifting program. Available at: <https://www.pbf.asn.au/gifting-program/>