

Support and Supervision Competences

Module 6 Quality Assurance

6A Monitor the quality of work from case records

To do this you need to be able to:

1. ensure that case records include an appropriate level of detail and that
 - clients circumstances, enquiry, and information/advice given are clearly stated
 - Advice/information is properly sourced and recorded
 - Next steps and action taken/to be taken, by whom and when are clear
 - Advice Issue Codes and any other statistics have been correctly recorded
 - Relevant documents are filed and the file is orderly
2. identify whether research and campaigns issues have been identified and appropriate action taken
3. identify mistakes and omissions.
4. ensure that appropriate and timely remedial action is taken

Before doing this you need to:

- a) have a detailed understanding of advice and gateway assessment quality standards
- b) know how to use case checking tools and guidance appropriate to your role
- c) be familiar with relevant requirements for case records
- d) understand the importance of upholding quality standards
- e) be able to feedback and challenge appropriately
- f) know bureau procedures for feeding back to workers
- g) Know relevant procedures for taking corrective action including consulting insurers if necessary
- h) know bureau systems for research and campaigns action, evidence recording and campaign work.

6B Manage quality of advice

To do this you need to be able to:

1. Monitor the quality of advice from case records as in 6A .
2. Develop and implement effective case checking and file review systems that comply with relevant quality standards
3. Ensure that workers supervising advice sessions and casework are competent for the role
4. Develop and implement effective moderation processes for case checking, file review and advice and casework supervision
5. Identify internal and external factors that impact on quality of advice
6. Develop and implement effective monitoring systems.
7. Make appropriate recommendations to senior management for improving quality, based on objective evidence.
8. Develop, implement, monitor and review action plans to drive improvement based on recommendations agreed by senior management.
9. Work supportively and co-operatively with other support and supervision staff to improve quality in their areas of responsibility
10. Develop and implement an effective evaluation process to ensure continual improvement in quality of advice.
11. Develop and implement effective communication systems to ensure staff understand the quality standards they are expected to work to, to report successes

Before doing this you need to:

- a) as for 6A
- b) Know the relevant sections of the Citizens Advice membership scheme and any other quality standards that relate to your work
- c) Understand the Citizens Advice audit and QAA processes and any other audit processes that apply, and what advice, casework and supervision standards bureaux need to achieve to comply
- d) Know how to ensure that staff supporting and supervising advice are competent for the role
- e) Know a range of moderation techniques
- f) Know what bureau and external processes impact on quality of advice and how to evaluate the impact of each objectively
- g) Understand the importance of the continual improvement cycle model in driving up quality
- h) Know how to report findings and make recommendations based on objective evidence
- i) Know the action planning process and how to use an action plan as a working document
- j) Know how to support and work co-operatively with other members of the management and support and supervision teams to improve bureau processes that impact on quality
- k) Know how to effectively evaluate your processes
- l) Know what roles impact on quality of advice and what they need to

<p>and improvements and advise what improvements are necessary and how this will be addressed.</p> <p>12. Work co-operatively and openly with QA assessor to address QAA findings</p>	<p>know to comply with standards</p> <p>m) Know how to motivate staff to keep improving standards and how to feedback when quality standards are not being met.</p>
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