

Specification of Competency Standards
for the Elderly Care Service Industry
Unit of Competency

Functional Area - Home and Community Care

Title	Accompany in Handling Bank Affairs
Code	110866L3
Range	This Unit of Competency is applicable to practitioners who provide their services in the elderly care service industry. The application requires performing a broad range of tasks in familiar and some unfamiliar working environments, and its execution requires analytical skills. Practitioners should be able to utilize relevant knowledge and skills to accompany the elderly persons in handling various banking affairs, according to the organization's procedures and guidelines and the elderly's needs on handling bank affairs, in order to protect the rights and interests of the elderly persons and staff.
Level	1
Credit	1 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Relevant knowledge on accompanying in handling bank affairs</p> <ul style="list-style-type: none"> • Understand the organization's procedures and guidelines on accompanying in handling bank affairs • Understand the organization's occupational safety and health guidelines • Understand the purpose and precautions of accompanying in handling bank affairs, including: <ul style="list-style-type: none"> ○ Ensure the elderly's safety and are attended during the process ○ Provide assistance when needed ○ Ensure that the rights and interests of the elderly and staff are protected • Understand the affairs that the elderly persons need to go to the bank for, what they need and preparations beforehand, and make appropriate arrangements, such as: <ul style="list-style-type: none"> ○ Identification documents ○ "Certificate for Picking Up or Setting Down of Passengers with Disabilities in Restricted Zones" ○ Mobility aid/wheelchair ○ Pocket medications ○ Water and food ○ Adequate money ○ Related items, such as: bank books, signature seals, reading glasses, ATM cards, etc. • Understand all aspects of the elderly's conditions and the assistance they may need, such as: <ul style="list-style-type: none"> ○ Conditions of their chronic disease ○ Mobility ○ Cognitive ability ○ Mental status ○ Medications, etc. • Understand the related service content, requires skills and precautions • Understand the transportation resources to help escort the elderly, such as: <ul style="list-style-type: none"> ○ Rehabus/Rehabus on-call service, etc. ○ Accessible hire car service ○ Wheelchair accessible taxi, such as: diamond cab, SynCab, etc. ○ Special vehicles arranged by the organization, etc. • Understand the safety and corresponding measures for the elderly with special needs when handling bank affairs, such as: <ul style="list-style-type: none"> ○ Measures to prevent the elderly with dementia from getting lost

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	<ul style="list-style-type: none"> ○ Take precautions against falls for the elderly persons with poor mobility ○ Measures to handle the elderly with poor cognitive ability, etc. <p>2. Accompany in handling bank affairs</p> <ul style="list-style-type: none"> ● Understand the elderly's conditions and needs, and prepare related materials according to the organization's procedures and guidelines, such as: support belts, mobility aids, etc. ● Arrange suitable transportation for the elderly in advance according to the location of the bank/ATM machine that the elderly needs to reach, as well as their physical condition ● Help the elderly inspect if they have brought all the necessary items to ensure that nothing is missing ● Ensure the rights and interests of the elderly and staff, the issues that must be attended to while accompanying the elderly persons in handling bank affairs, such as: <ul style="list-style-type: none"> ○ Determine whether the mental state of the elderly is stable, report the elderly's condition to the senior/supervisor to consult for their opinions regarding their suitability for handling bank affairs on the day, and reschedule as needed ○ If the elderly's cognitive ability is weaker or suffers from dementia, inform the senior/supervisor to arrange for family members/guardian to accompany the elderly before going through relevant procedures ○ If the transaction involves cash, such as withdrawals, deposits, etc., it must be arranged by the senior/supervisor, or seek a third party to witness the process, such as: the elderly's friend, bank staff, etc. ○ Avoid getting involved in any privacy dilemmas, such as: when the elderly's account password is being entered, turn around so the staff couldn't see the password, etc. ○ When handling the elderly's important personal belongings or valuables, remind them to store the items properly ● Utilize appropriate knowledge and the correct skills to provide escort services according to the elderly's physical conditions, in order to ensure their safety, such as: <ul style="list-style-type: none"> ○ Understanding of community facilities, utilize wheel-chair accessible passages and facilities as much as possible ○ Skills for using assistive devices and assisting the elderly in their use ○ Supporting skills ○ Transferring and lifting skills ○ Skills for using wheelchairs, etc. ● Protect yourself using different methods to avoid strains or injuries on duty, according to the organization's occupational safety and health guidelines, such as: <ul style="list-style-type: none"> ○ Maintain the correct posture ○ Use energy-saving methods, etc. ● Do not leave the elderly unattended during the entire process ● In case of emergencies, timely report the elderly's condition to the senior/supervisor <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> ● Comply with the organization's procedures and guidelines on handling bank affairs, handle the elderly's bank affairs for them, and protect their privacy and safety during the process
Assessment Criteria	<p>The integrated outcome requirements of this Unit of Competency are:</p> <ul style="list-style-type: none"> ● Able to accompany the elderly in handling bank affairs according to their needs, utilize appropriate knowledge and the correct skills in order to ensure their safety and rights.

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Remark	
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