

## CH K1 Assess the needs of the client (Kinesiology)

### OVERVIEW

This standard describes the role of the practitioner in assessing clients' needs which affect their health, effective functioning and well-being. This involves evaluating requests for kinesiology and the initial information received on the client, whether it is provided by the client him/herself or comes from another source, such as a referral. In doing this the practitioner needs to consider whether it is appropriate to work with the client or not. The evaluation will include determining the urgency of the client's needs and the overall caseload of the practitioner, together with making the necessary arrangements for the assessment to take place. If the decision is made to see the client, the nature and purpose of the assessment is agreed with them and their needs identified. Some clients may be accompanied by a companion(s). Where this occurs the practitioner is expected to interact with the companion(s) in ways that are appropriate to the needs of the client and the needs of the practitioner. The subsequent assessment aims to determine the nature and extent of the client's needs and to agree a course of action with them. This may be to develop a complementary healthcare programme for the client, to refer the client to another healthcare practitioner or to decide that kinesiology is not appropriate for the client.

This standard applies to any practitioner whose work aims to enable clients to improve and maintain their health, effective functioning and well-being through complementary and alternative healthcare wherever they practise. The clients may be seeking to improve and maintain their health, effective functioning and well-being. Equally, they may have no particular health needs or may have acute or chronic conditions, or be terminally ill. They may be new to kinesiology, new to the practitioner, established in that the practitioner has been working with them for some while or returning to the practitioner after a period of absence. This standard is based on the premise that for effective assessment to take place, the practitioner needs to understand the clients' personal, cultural and social situation and the holistic nature of health, effective functioning and well-being. The practitioner must be able to communicate effectively with clients and any companions and balance the information obtained initially with information gained during the assessment. As the assessment process often acts as a gateway to services, there is also a particular requirement for practitioners to monitor clients and evaluate the extent to which services are meeting the needs of the broad community. Where particular issues or incidents cause concern the practitioner is expected to alert their professional body, their employing organisation or other relevant organisation.

Users of this standard will need to ensure that practice reflects up to date information and policies.

## KNOWLEDGE AND UNDERSTANDING

You will need to know and understand:

1. the professional standards and code of conduct for your discipline
2. the role of the professional body setting the rules and ethics of your discipline
3. the rules, ethics and codes of conduct of your profession and how they apply to your own practice
4. why it is important to keep your understanding of professional rules and codes of conduct up to date
5. how to balance your own responsibilities as a professional with any contractual or other requirements of any organisation within which you work
6. current relevant health and safety legislation and how it applies to your own work role
7. legislation relating to obtaining, storing and using information and supplying services
8. the importance of keeping your understanding of legislation up to date
9. how relevant legislation impacts on your own work
10. the roles and functions of the principal agencies with whom you work
11. sources of information within the health and social care sector and how to access them
12. why it is important to respect the rights of clients
13. the extent of your own remit as a practitioner and the limits of your responsibilities
14. how your own role relates to that of other professionals within the principal agencies with whom you work
15. the organisational requirements and restrictions relating to the use of resources
16. the range of resources and options available to meet the client's needs
17. how to achieve effective communication through observation, sensitive questioning and listening
18. how to adapt vocabulary, pace and tone of speaking to meet the needs of the client
19. what forms of verbal and non-verbal communication are available and how to use these positively
20. how to check understanding with the client by reading and using a variety of signals
21. how to position self and client to encourage communication
22. how to recognise and overcome barriers to communication
23. why certain environments can inhibit communication and how to minimise this
24. why it is important to encourage the client (and any companion(s)) to ask questions, seek advice and express any concerns
25. the nature of a professional relationship and how to develop it with clients the need for, and how to use, inter-personal skills when communicating with the client
26. how to respond to conflicting advice which clients may receive from different practitioners
27. why it is important to reflect on your own practice and identify any development needs
28. how to evaluate the effectiveness of your own actions and learn from experience
29. the information available on effective complementary healthcare and how to

- evaluate and use this information within your own practice
30. how the models and concepts in your area of practice have evolved and developed, how they tend to change with time and the similarities and differences between different versions
  31. how to develop links with other healthcare providers and the protocols for doing this
  32. how to acknowledge the limits of your own knowledge and competence and the importance of not exceeding these
  33. the importance of recognising and maintaining the client's right to confidentiality
  34. how to balance the client's rights against your responsibility to others
  35. what to take into account when passing on information about clients
  36. what the procedures and requirements on confidentiality, security and transmission of information are for your organisation and for any other organisation that you may need to contact regarding a client
  37. the ways in which confidentiality may be breached and how to prevent this occurrence
  38. what is meant by "implied" and "informed" consent and the circumstances in which these may arise
  39. the guidance given by your professional body on implied and informed consent and when written consent should be obtained
  40. why it is important to ensure that clients have been given sufficient information to give or refuse consent
  41. who holds responsibility for gaining consent and when this should be done
  42. how informed consent may be obtained from clients who are unable to give the consent themselves and who has the right to give this consent
  43. how to confirm that the agreements reached are likely to be in the clients' best interest
  44. what the policies on consent, including any specific requirements under contractual agreements are for your organisation and for any other organisation that you may need to contact regarding a client
  45. why it is important to protect client confidentiality
  46. how to keep records to protect confidentiality and security of information
  47. how to keep records so that an audit can be undertaken
  48. why it is important to record all the necessary information in a format suitable for further use
  49. who has the right of access to information held on records
  50. why it is important to acknowledge and respect an individual's rights and dignity and ways of doing this
  51. what circumstances may indicate a need for the presence of a third party
  52. who may act as a companion for the client and how to interact with them
  53. what your legal and ethical responsibilities are in relation to the client's health and safety
  54. how to maintain your practice in line with health and safety legislation
  55. how to be supportive to the client (and any companion) whilst managing time effectively
  56. how to obtain information on commonly encountered diseases, drugs and their side effects
  57. the concept of health, effective functioning and well-being that is consistent with the practice, principles and theory underlying your discipline
  58. why it is important to recognise that the client's previous and present care may affect their health, effective functioning and well-being
  59. how the psychological and emotional balance of the client may affect their health,

- effective functioning and well-being
60. how to recognise when the body is in health balance and when it is not functioning as it should
  61. how signs and symptoms may be suppressed or altered by other factors such as medication, exercise, diet
  62. how the client's diet, lifestyle and emotional state can affect their health, effective functioning and well-being
  63. how the physical, social, emotional and economic context in which people live affects their health, effective functioning and well-being
  64. how personal beliefs and preferences affect how clients live and the choices they make
  65. what resources are available to clients to make changes to the context in which they live and make choices about their lifestyles
  66. the nature of illness and the impact this may have on a client's health, effective functioning and well-being
  67. why it is important to recognise conditions which may pose a serious risk to the client and when to seek immediate help or advice from other professional sources
  68. the nature of disability and your role in working with those who have disabilities
  69. how an individual's abilities and disabilities may affect the nature and form of support and manner in which you provide it
  70. the history, principles and development of kinesiology from the original research by Dr. George Goodheart to the present day
  71. how to recognise when kinesiology may be a suitable healthcare option for the client
  72. how to recognise when kinesiology may complement other healthcare which the client is receiving
  73. how to recognise conditions for which the discipline is incomplete in itself and for which the client should seek advice from other sources
  74. the circumstances when you may choose not to accept a client:
    1. kinesiology is unlikely to succeed
    2. the client does not want kinesiology
    3. you do not wish to provide treatment
  75. the circumstances when you must not accept a client:
    1. kinesiology is contra-indicated
    2. you do not have the requisite experience or expertise
    3. other healthcare should be sought
  76. the range, purpose and limitations of different methods, which may be used for different clients with different needs
  77. how to determine the most appropriate method(s) for different clients and their particular needs
  78. how to tailor treatment appropriately for each individual
  79. how to judge whether self-help procedure(s) is/are appropriate for the client
  80. the structure, function, location and interaction of; cells, tissues, glands, organs and systems
  81. the structure and function of the skeletal system
  82. the types, classification and structure of joints: range of movements
  83. the structure and function of muscles, including types of muscles (voluntary, involuntary, cardiac)
  84. the definition of origin and insertion of muscles
  85. the origin, insertion and actions of the major muscle groups
  86. the functional interaction of muscles
  87. muscle tone and how and why it can vary

88. muscle fatigue: the causes and recognition
89. the structure and function of the following:
  1. cardio vascular system
  2. lymphatic system
  3. nervous system
  4. endocrine system
  5. digestive system
  6. respiratory system
  7. urinary system
  8. reproductive system
  9. immune system
90. the skin
91. cells and tissues
92. glands and organs
90. the interdependence of the body systems
91. the anatomy and physiology of the digestive system
92. the role of digestive enzymes
93. the metabolism of carbohydrates, proteins and lipids
94. the function of vitamins, minerals, amino acids, essential fatty acids, antioxidants and phytochemicals
95. the role of water and fibre
96. food combining and acid/alkaline balance
97. anti-nutrients: sugar, heavy metals, pesticides, free radicals, drugs, stimulants
98. factors affecting food quality: production, storage, processing, preparation
99. ideal diet and nutritional indices
100. safe and effective use of supplements in nutrition
101. allergy and food sensitivity
102. the concept of balance and imbalance
103. the principles of:
  1. healing processes
  2. disease processes
  3. allergies and sensitivities
  4. nutritional deficiency
  5. toxicity
  6. drug interactions
104. the energetic connections and corrections of the muscles that meet the specific requirements of both foundation and advanced training within a professionally recognised branch of kinesiology.
105. the structure and functions of the acupuncture meridian system
106. the inter-relationship between the acupuncture meridian system with the other body systems
107. how to use muscle testing and muscle monitoring to identify an imbalance in the muscle meridian organ gland circuits
108. how to use muscle testing and muscle monitoring to reveal imbalances in and between the different systems
109. how to use muscle testing and muscle monitoring as a biofeedback mechanism by deliberately applying a stimulus/stimuli to elicit a response (challenge)
110. how and when to apply the methods of Kinesiology in relation to chemical, structural, emotional and/or energetic imbalances
111. the common methods of Kinesiology and the effects of:
  1. nutritional support
  2. neuro-lymphatic reflex stimulation

3. neuro-vascular reflex holding points
4. meridian energy balancing
5. elements balancing
6. electro-magnetic balancing
7. emotional stress release
8. subtle energy balancing
9. vibrational energy balancing
10. exercise/movement
11. structural balancing
112. how to check the effectiveness of the corrections and treatment using muscle testing, muscle monitoring and/or observation
113. the importance of explaining the treatment and self-help options and methods to meet the needs of the client and what the potential consequences of not doing so may be
114. the role which the client (and others) may take, and may need to take, if the treatment or self-help is to be successful and how to explain and agree them with the client (and any companion)
115. how to support the client to make informed choices
116. the importance of agreeing the location and timing of the complementary healthcare sessions with the client and the factors, which may intervene and alter plans
117. why evaluation methods should be determined at the planning stage and what the client's role will be in the evaluation
118. the importance of encouraging the client to be as actively involved as possible and the relationship of this to the promotion of their health, effective functioning and well-being
119. how to monitor and evaluate changes in the client, assess which changes are related to the treatment and use this information to inform future practice
120. how to evaluate efficacy and suitability of the complementary healthcare for a client and how to decide when it should be halted and/or discontinued
121. methods and processes for evaluating information as the complementary healthcare proceeds and using this to inform future practice
122. the potential risks associated with client self-help and the extent of your responsibilities
123. the importance of giving clear and accurate advice on self-help and the consequences of not doing so
124. what information is needed for the review to be carried out effectively
125. how to review the effectiveness of the complementary healthcare programme with the client and evaluate the extent to which their needs have been met
126. the importance of evaluating the complementary healthcare as a whole
127. how and why you should encourage the client (and any companion) to take a full and active part in the review process and to offer their views
128. how the client (and any companion) may indicate concerns in the process without making their concerns clear and explicit
129. the importance of active listening in evaluating the kinesiology programme with the client
130. the range of different ways in which the kinesiology programme can be altered to meet the needs of the client and the ways in which their needs may have changed
131. why it is necessary to help and support the client to consider the implications of any changes made to their programme of care
132. how to record the content and outcomes of the review process and what information should be included

133. the variety of reasons there may be for discontinuing the complementary healthcare programme with the client

## PERFORMANCE CRITERIA

You must be able to do the following:

1. evaluate requests for services for their appropriateness
2. direct clients to alternative service providers where appropriate
3. communicate verbally or in writing in a manner, and at a level and pace appropriate to the individual
4. establish the client's particular requirements through sensitive questioning
5. determine the severity of the client's needs or the risk of their condition deteriorating
6. ensure that any fee structures, charges and different methods of payment are clearly understood
7. explain possible outcomes, charges and duration of services to the client
8. arrange a suitable time and location for the assessment and agree those who should be present
9. explain clearly the reasons for any delays between requests and assessment
10. record arrangements made for the assessment fully and accurately
11. ensure that the assessment environment is appropriate for the client and their needs
12. present a professional appearance and be prepared and fit to carry out the assessment
13. ensure that any equipment, materials, and surrounding work area are prepared and meet professional codes of practice, legal and organisational requirements
14. evaluate the client's initial approach and manner to assess their needs
15. introduce the client and any companion to those present and confirm individual roles
16. communicate effectively and in a manner which maintains client goodwill, trust and confidentiality
17. explain the nature, scope and duration of the assessment and any related interventions
18. inform the client of the records to be made and their right of access to these
19. encourage the client to ask questions, seek advice and express any concerns about the assessment
20. confirm the consent of the client to the assessment
21. interact with any companion(s) of the client in ways that are appropriate to the needs of the client and to your needs
22. respect the client's privacy and dignity throughout the assessment and ensure they are as comfortable as possible
23. position the client for effective access and to minimise risk of injury to self and discomfort to the client
24. conduct the assessment in a manner which encourages the effective participation of the client and meets their particular requirements
25. support the client to identify significant aspects of their lives and use this to inform

- the assessment
26. where possible determine any contra-indications or restrictions to assessment and take appropriate action
  27. use assessment methods which are safe, appropriate to the client's presenting condition and comply with professional and legal requirements
  28. systematically establish the client's needs and draw valid conclusions
  29. seek advice and support from an appropriate source when the needs of the client and the complexity of the case are beyond your own remit or capability
  30. halt the assessment at the request of the client or when the information obtained means that it is unsafe to proceed
  31. inform the client when additional information is required and obtain their consent to obtain the information
  32. evaluate the information obtained for and during the assessment and determine appropriate action
  33. ensure records are signed, dated and include all relevant details and any supporting information
  34. explain the outcomes of the assessment clearly and in a manner, level and pace appropriate to the client
  35. balance possible successful outcomes with any inherent benefits and risks and the legal duty of care to the client
  36. inform the client of the content, level of risk, duration and projected costs of the proposed action
  37. explain any restrictions to the use of kinesiology and advise on realistic expectations
  38. advise the client when kinesiology is unsuitable and enable them to seek other healthcare where appropriate
  39. recommend and agree action to suit the client's condition and identified needs
  40. record the outcomes of the assessment accurately and in sufficient detail to meet professional requirements
  41. store the records securely

## **ADDITIONAL INFORMATION**

This National Occupational Standard was developed by Skills for Health.

This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004):

Dimension: HWB5 Provision of care to meet health and wellbeing needs