Training sheet

Presenting your important, additional information on follow-up enquiries

Trained members of staff must know what important, additional information should be provided to a potential resident or their representatives if they get back in touch with your home after an initial enquiry – whether that's done by phone, in person or online.

This advice sheet intends to help guide staff through that process.

Follow-up telephone enquiries

1. After you have identified that your caller is ringing to find out more detail about your home – following an earlier, initial enquiry – tell them where they can find the important, additional information on your website.

2. Also, offer to send them the information if that's how they would prefer to receive it – for example, if they are unable to access or use the internet, or do not want to look for the information online. This could be sent to them on a separate sheet as part of an information pack, which highlights the important additional information.

3. Be ready and able to proactively answer any questions your caller may have about your home and wthe additional information you are supplying.

When people request more information during their initial enquiries

In practice, people may want all the available information about your home – that is, the key information and the important additional information – during their first enquiry.

This might be because:

- They need to find a suitable home quickly
- Your home is the only one in the area that has a current vacancy
- They've already done a lot of research and expressed a clear interest in securing a place in your home

Where this happens, you should provide both your key information and important, additional information at the same time (for example, in a single resident information pack) – but your key information must be given particular prominence.

Training sheet

When people visit your home again

1. Welcome your visitor(s) and settle them into a room where you can talk without interruption.

2. Let them explain where they're at in finding a suitable home (they will have already made preliminary enquiries, such as an initial visit).

3. When they've finished, explain how pleased you are that your home is still under consideration, and that you have some important, additional information to share, to help them make an informed decision about whether your home will ultimately suit their needs best. Then talk through the following details with them:

a. Details of any trial period, including how long it lasts

b. Information about what happens if a resident's funding arrangements change while they are living in your home

c. Your complaints handling procedure

d. The reasons why you or the resident may need to end a contract, and any associated conditions – including the notice period given

e. Pre-contract information, such as your trading name and contact details, unless it's already apparent

f. How your home is regulated and by which regulator

g. Details of who is registered as running your home and whether there is a registered manager in post. If there's not one, explain the alternative arrangements that are in place

h. Your latest food hygiene rating

i. What contents insurance you have in place

j. Any person-specific requirements, including whether residents can bring pets, choose male/female carers and whether you can meet dietary or religious requirements

i

Your important, additional information must be given to a potential resident and their representatives in a clear, accurate, accessible, unambiguous and timely manner to help them make an informed decision about whether to accept any offer of a place in your home. It must be provided, at the latest, by the time the potential resident and their representatives agree to have a care needs assessment. It should be easily accessible to people from the start of their research – including on your website – and you should take active steps to provide it in sufficient time for people to be able to consider it before they agree to have a care needs assessment.

k. Where people can find a copy of your standard T&Cs for residents paying for their own care – for example, they should be included in your resident information pack and signposted on your website

l. Any other information required under each UK nation's specific sector regulations, or guidance to help people make informed decisions

m. Any other information required under consumer law

n. Any other information relevant to a particular resident's circumstances, such as the need for a third-party contributor

4. When you've finished – and answered any questions – give them this information in writing to take away. For example, this could be set out on a separate sheet in an information pack, highlighting the information in a clear and accessible manner. You should also provide them with a copy of your standard contract/terms and conditions for self-funded residents.

5. If they're happy to continue and you're sure they've understood everything you've discussed, you could, for example, invite them on a tour of your home, or see them out.

In practice, people may want all the available information about your home – that is, the key information and the important additional information – during their first enquiry.

This might be because:
- They need to find a suitable home quickly
- Your home is the only one in the area that has a current vacancy
- They've already done a lot of research and expressed a clear interest in securing a place in your home

Where this happens, you should provide both your key information and important, additional information at the same time (for example, in a single resident information pack) – but your key information must be given particular prominence.

When asked to supply your key information and important, additional information at the same time, your key information should be given particular prominence, for example, by displaying this on a 'key facts' sheet at the front of an information pack.

These steps should be followed to ensure that the potential resident and their representatives have sufficient time to consider the important, additional information before they agree to have a care needs assessment.