

## Housing Occupational Standards

### H3 08 Set up and manage tenancy, licence and leaseholder agreements (SQA Unit Code F7DW 04)

#### *Unit Summary*

This unit is for you if you are responsible for signing up customers to tenancy, licence or leaseholder agreements.

#### *Performance Criteria*

You must be able to:

- 1 use correct documentation for the type of occupancy being proposed
- 2 complete all agreement documentation fully, accurately and in line with organisational procedures
- 3 enter appropriate data into your organisational management information systems
- 4 explain the content and requirements of the agreements to customers and ensure that customers understand and agree with the terms and conditions
- 5 verify the accuracy of information provided by customers
- 6 ensure that all agreement documentation is signed in accordance with your organisational requirements and distributed to the appropriate people
- 7 explain your appeals and/or complaints procedures clearly and accurately to the customer
- 8 identify customers' specific needs for information and support
- 9 ensure that customers are satisfied with the accommodation, services and facilities provided under their agreements
- 10 carry out any necessary follow-up actions in line with set procedures
- 11 take appropriate action to rectify problems identified by customers
- 12 refer customers appropriately if you are unable to provide further help
- 13 record the outcomes of all follow-up actions in accordance with your organisational policy and procedures

### *Knowledge and Understanding*

To be competent, you must know and understand:

- (a) how to communicate effectively with customers
- (b) the need for information to be accurate
- (c) the procedures and quality assurance systems covering agreements made between your organisation and customers
- (d) the range of standard agreements in use
- (e) how to complete the necessary documentation accurately and fully
- (f) the legal rights and responsibilities of all parties to the agreement
- (g) who is entitled to receive copies of agreements
- (h) the need to protect confidentiality
- (i) the data entry requirements
- (j) the legal conditions under which occupancy conditions can be changed
- (k) your organisation's appeals and/or complaints procedures
- (l) your organisation's procedures for follow up actions
- (m) your organisation's procedures for dealing with problems identified by customers
- (n) relevant procedures and legislation covering the enforcement of tenancy conditions