
Overview

This standard is about supporting clients to make use of available services. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by welfare professionals and others.

The standard covers enabling clients to decide on whether to use services or not, agreeing how they will use services and identifying and providing information as needed to clients.

**Performance
criteria**

- You must be able to:
- 1 clarify clients' expectations and understanding of services in line with organisational policies
 - 2 identify information about services in line with the needs of clients
 - 3 discuss with clients the range of services available and the advantages and disadvantages of each
 - 4 explore with clients reasons for their information requirements
 - 5 provide information about services to help clients decide whether or not their requirements can be met
 - 6 encourage clients to clarify their requirements and circumstances in line with their needs
 - 7 agree appropriate ways in which services may be used by clients
 - 8 explain next steps to clients in line with their needs
 - 9 confirm information required and agree with clients appropriate methods and timescales for providing information
 - 10 retrieve information required by clients in line with organisational requirements
 - 11 confirm with clients that information materials are sufficient and appropriate to their requirements provided
 - 12 address problems arising from providing information to clients in line with organisational procedures
 - 13 refer clients to appropriate additional or alternative sources of information in line with their requirements
 - 14 record information discussed with clients using appropriate systems in line with organisational requirements
 - 15 comply with all relevant legal, professional and organisational requirements and guidelines when supporting clients to make use of services

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Knowledge and understanding

You need to know and understand:

- 1 the importance of complying with relevant legal, professional and organisational requirements and guidelines relevant to your role
- 2 legislation, codes of practice, organisational policies and procedures in relation to job role/activities undertaken
- 3 how to encourage clients to express themselves and their requirements
- 4 different methods of communication and how to adapt them to suit the needs and preferences of clients
- 5 types of information that should be obtained from clients
- 6 information available about services and how to access them
- 7 what information is appropriate for different clients
- 8 how to assess information to ensure it is accurate and up to date
- 9 how to present different types of information to clients in suitable formats
- 10 how to help clients decide whether their requirements can be met by services
- 11 how to address difficulties and different expectations of clients
- 12 issues that may occur when using different services for different clients
- 13 range of services and agencies which can provide additional support
- 14 how to match services to clients requirements and why it is important to confirm requirements
- 15 how clients may wish to use services and procedures for using them
- 16 what actions could be taken for different clients and how to explain them
- 17 types of information clients seek and different reasons they have for seeking it
- 18 how to assess clients' requirements and the importance of confirming information required and timescales
- 19 different methods available for providing information, formats used to present it and how to check clients understanding of information
- 20 why it is important to check clients have received the information materials they require and that they are sufficient and appropriate
- 21 types of problems that may arise when providing information to clients and how to deal with them
- 22 recording requirements of your organisation, including how to store

recorded information securely

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Suite	Advice & Guidance; Legal Advice;
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