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**Overview**

This standard requires you to access and verify legal information and advice. The standard covers the technical and ethical requirements in relation to researching legal information. The client may be an internal client i.e. a colleague within the organisation, or an external client i.e. a member of the public or someone from another advice agency.

**There are two elements**

- 1 Confirm the nature of clients' needs
- 2 Research legal information and advice

# SFJIA5 - SQA Unit Code HA5J 04

## Research legal information and advice

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### Performance criteria

### Confirm the nature of clients' needs

- You must be able to:
- P1 establish with clients the nature of their legal information and advice needs
  - P2 agree with clients the procedures and timescales for providing advice required
  - P3 analyse available client information that may inform their legal information and advice needs
  - P4 explain organisational procedures for researching legal information and advice
  - P5 record client details and agreed actions using organisational procedures for recording and storing client details

### Research legal information and advice

- You must be able to:
- P6 access relevant sources of legal information and advice to meet clients' needs
  - P7 assess information sources for accuracy, including:
    - P7.1 currency
    - P7.2 independence of information and advice
  - P8 record research findings in line with organisational procedures
  - P9 comply with all relevant legislation, including:
    - P9.1 codes of practice
    - P9.2 guidelines
    - P9.3 ethical requirements
    - P9.4 conflict of interests

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## Research legal information and advice

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### Knowledge and understanding

- You need to know and understand:
- K1 the importance of confirming with clients the nature of their legal information and advice needs
  - K2 the importance of agreeing with clients the procedures and timescales for providing advice required
  - K3 different types of client information available about cases, and why it is important to review this
  - K4 the relevant national, local, professional and organisational requirements relating to:
    - K4.1 equal opportunities
    - K4.2 discrimination
    - K4.3 health and safety
    - K4.4 security
    - K4.5 confidentiality
    - K4.6 data protection
    - K4.7 conflicts of interest
  - K5 the importance of complying with national, local, professional and organisational requirements
  - K6 organisational procedures for recording and storing client details
  - K7 how to use the intranet and internet as research tools
  - K8 organisational procedures for identifying appropriate information sources that provide legal information and advice
  - K9 organisational procedures for assessing information sources for accuracy, currency and independence
  - K10 the importance of assessing information sources for accuracy, currency and independence
  - K11 the importance of working within the boundaries of your role
  - K12 organisational procedures for recording and storing research findings
  - K13 legal and health and safety regulations for use of IT equipment, and why it is important to follow them

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### Additional Information

#### Skills

The skills you will need to enable you to deliver the service effectively are:

- 1 questioning
- 2 active listening
- 3 summarising
- 4 checking understanding
- 5 reviewing/reflecting
- 6 prioritising
- 7 decision making
- 8 recording and storing information

## SFJIA5 - SQA Unit Code HA5J 04

### Research legal information and advice

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**Relevant occupations** Legal Advisers; Legal Associate professionals

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**Suite** Legal Advice

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**Key words** Technical requirements; ethical requirements; analyse information; evaluate information;