

SFJGA2

Support clients to make use of the advice and guidance service



Overview

This unit is for you if you are involved with interviewing clients. You could be carrying out a preliminary interview or it may be that the client has been referred to you by a colleague or another agency.

There are three elements

- 1 Enable clients to decide whether to use the service
- 2 Agree with clients their use of the service
- 3 Identify and provide the information required by clients

SFJGA2

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Performance criteria

Enable clients to decide whether to use the service

You must be able to:

- P1 encourage clients to clarify their requirements and circumstances
- P2 identify and provide the client with appropriate and accurate information about the service
- P3 use the information provided to assist clients decide whether their requirements could be met by the service
- P4 clarify clients' expectations and understanding of the service and its policies
- P5 provide clients with information on the advantages and disadvantages of using the service
- P6 provide clear information on other services that might be more suitable for meeting their requirements

Agree with clients their use of the service

You must be able to:

- P7 clarify and confirm clients' needs and how these will be met by the service
- P8 agree the way the service will be used
- P9 explain clearly the actions that are necessary to fulfil clients' needs
- P10 agree with clients the procedures for using the service
- P11 record contacts and agreements with clients in the appropriate systems
- P12 comply with all relevant legislation, codes of practice, guidelines and ethical requirements

Identify and provide the information required by clients

You must be able to:

- P13 explore with clients the reasons for their information needs
- P14 identify the information sources most appropriate to the client
- P15 confirm the information required and agree the most appropriate methods for providing the information
- P16 retrieve the relevant information from the appropriate systems
- P17 check clients' understanding of the information
- P18 confirm with the clients the information materials that are provided are sufficient and appropriate to their needs
- P19 identify any problems with providing the information and take appropriate action to address them
- P20 refer clients to additional or alternative sources of relevant information
- P21 agree with clients any further activities that are necessary to meet their needs
- P22 record the provision of information in the appropriate systems

SFJGA2

Support clients to make use of the advice and guidance service

Knowledge and understanding

You need to know and understand:

Enable clients to decide whether to use the service

- K1 how to encourage clients to express themselves and their requirements
- K2 what type of information should be obtained from the client
- K3 what difficulties can occur when clients express their requirements and circumstances
- K4 what information is available about the organisation and its service
- K5 what information is appropriate for different clients
- K6 how to assess information to ensure that it is accurate and up to date
- K7 what types of format are suitable for different clients
- K8 how to present different types of information to clients
- K9 how to assist clients to decide whether their requirements can be met by the service
- K10 how to address any difficulties with the information provided
- K11 how to address different expectations
- K12 what types of misunderstanding can occur
- K13 what are the advantages and disadvantages of using the service
- K14 what the consequences are of using the service for different clients
- K15 which other services are available
- K16 what is offered by other services
- K17 how to approach other services

Agree with clients their use of the service

you need to know and understand:

- K18 how to clarify clients' needs
- K19 how to match clients' needs to the service being provided
- K20 why it is important to confirm clients' needs
- K21 what the consequences are of not confirming the needs
- K22 what options for contact with the service are available
- K23 how different clients may wish to use the service
- K24 what the procedures are for using the service
- K25 what actions could be taken for different needs
- K26 how to explain actions to clients
- K27 what the systems for recording needs are
- K28 why it is important to use the systems
- K29 what the procedures relating to the use of the systems are
- K30 what the relevant national, local, professional and organisational requirements are relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection
- K31 why it is important to comply with different requirements
- K32 what the consequences are of not complying with different requirements
- K33 how to obtain information on the requirements

SFJGA2

Support clients to make use of the advice and guidance service

Identify and provide the information required by clients

you need to know and understand:

- K34 the types of information clients seek and the different reasons they have for seeking it
- K35 how to assess clients' needs and match them with current information sources
- K36 why it is important to confirm the information required
- K37 the different methods available for providing information and the different formats that can be used to present it
- K38 why it is important to agree that the information will be provided
- K39 what the systems for retrieving information are, and the procedures relating to those systems
- K40 why it is important to use the systems
- K41 how to check clients' understanding of the information
- K42 why it is important to check that the clients have received the information materials they require and that they are sufficient and appropriate
- K43 what types of problem could occur
- K44 what actions can be taken to address them
- K45 why it is important to address problems
- K46 what the implications are of not addressing the problems
- K47 what other sources of information could help the clients and how these can be accessed
- K48 what other activities might be necessary
- K49 what the systems are for the recording the provision of information and the procedures relating to those systems
- K50 why it is important to use the systems
- K51 which procedures relate to the use of the systems

SFJGA2

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Additional Information

Skills

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

Enable clients to decide whether to use the service

questioning
active listening
presenting information
summarising
decision making
interviewing

Agree with clients their use of the service

questioning
active listening
presenting information
recording and storing information
summarising
decision making
interviewing

Identify and provide the information required by clients

questioning
active listening
researching information
selecting information
presenting information
recording and storing information
summarising
decision making
interviewing

SFJGA2

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