

ASTLLCI

Register and confirm personal search instructions from clients



Overview

This unit is about receiving instructions from clients to carry out a personal search of the Local Land Charges Register and other registers and confirming the arrangements with clients. The unit is aimed at those who compile and retail personal searches on a commercial basis.

There is one performance standard:

1. Register and confirm personal search instructions from clients

Who is it for?

This unit is for you if you:-

1. Respond to enquiries for personal searches of Land Charges Registers and property information

There is one element:

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Performance criteria

- You must be able to:*
- P1 respond promptly to requests from existing or potential clients to undertake a personal search
 - P2 where necessary clarify and confirm the requirements and expectations of clients
 - P3 where necessary, respond to any client queries, referring to relevant personnel for advice or clarity
 - P4 inform the client of the fees applicable to the required searches and any additional or supplementary costs involved
 - P5 explain to the client the terms and conditions under which personal searches will be conducted, including any restrictions or limitations of a personal search
 - P6 identify any circumstances that prevent a personal search from being undertaken and explain the reasons to the client politely and clearly, seeking advice as appropriate
 - P7 confirm with the client the instructions and the terms, conditions and arrangements that have been agreed
 - P8 confirm with the client the schedule for conducting searches, where appropriate, and the planned date for completion of the report or certificate
 - P9 confirm with the client any specific arrangements that apply to the search
 - P10 record in an appropriate format the details of the searches required and the schedule for conducting the work

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Knowledge and understanding

You need to know and understand:

Communication and information

- K1 information to which you are entitled as part of the personal search and local enquiries
- K2 information to which you are not entitled or for which an additional fee is payable
- K3 how to clarify and confirm the requirements and expectations of the client

Land and Property Information

You need to know and understand:

- K4 the implications of legislation relevant to your ability to provide personal searches to clients
- K5 the purpose of the relevant register/s and documents and the information they do and do not contain
- K6 the fees for conducting personal searches and forms of payment which are acceptable
- K7 the fees for obtaining additional property information, as required, and forms of payment that are acceptable
- K8 the nature of a planning consent and the different types of consent

Organisational context

You need to know and understand:

- K9 the legislation giving rise to personal searches
- K10 regulations under that legislation relating to the job of personal search agents and the undertaking of personal searches
- K11 the limitations and constraints that apply to the conducting of personal searches
- K12 local systems and procedures for searching land registers and other sources
- K13 the timescales involved in conducting personal searches and obtaining relevant land and property information
- K14 company procedures for receiving and confirming instructions
- K15 the current workload and capacity of the organisation to conduct required personal searches

Quality Assurance

You need to know and understand:

- K16 the importance of confirming in writing the arrangements agreed between you and the client

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Additional Information

Scope/range related to performance criteria

1. **Client**
 - 1.1. seller
 - 1.2. solicitor
 - 1.3. conveyancer
2. **Fees**
 - 2.1. basic fees
 - 2.2. supplementary fees
3. **Register**
 - 3.1. held as text record
 - 3.2. held in map form
 - 3.3. held in an electronic database
 - 3.4. held on a geographic information system (GIS)
4. **Respond to requests from clients**
 - 4.1. face to face
 - 4.2. in writing
 - 4.3. by telephone
 - 4.4. by email
 - 4.5. by fax
5. **Acknowledge arrangements**
 - 5.1. access to records
 - 5.2. those present at the time of inspection
6. **Circumstances that prevent carrying out searches**
 - 6.1. properties valued in excess of your current level of insurance
 - 6.2. your own diary pressures

Links to other NOS

How does it relate to other units?

LLCI is one of a group of seven units which describe the functions involved in conducting personal searches and compiling information for clients.

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Originating organisation Asset Skills

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Relevant occupations Administration and Secretarial Occupations; Government and Related Organisations; Business and Finance Associate Professionals; Managers and Proprietors in Hospitality and Leisure Services; Managers in Farming, Horticulture, Forestry and Fishing; Architects, Town Planners and Surveyors; Legal Professionals; Public Service Professionals

Suite Local Land Charges and Property Information 2009

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