

---

## Overview

This standard is about the core competence that everyone working in the administration of local taxation, benefits, grants and other relief schemes needs, regardless of their role or function. It involves understanding relevant legislation and regulations, understanding the relevant local environment and working within organisational requirements to ensure effective working.

---

## Performance criteria

### *You must be able to:*

1. store files and documentation in accordance with the relevant organisational procedures and requirements
2. locate and retrieve information relating to local taxation and/or benefits, grants and other relief schemes, in your organisation's record-keeping system as required to fulfil your role
3. work with other staff, departments, offices or agencies to obtain information relating to local taxation and/or benefits, grants and other relief schemes, as required
4. provide information relating to local taxation and/or benefits, grants and other relief schemes, to other staff, departments, offices or agencies as required in line with data protection legislation
5. issue relevant forms to applicants as required, in accordance with the relevant local operating procedures
6. confirm that all relevant application forms and documents received, comply with your organisation's requirements, and follow up any missing information where required
7. follow up any forms not received by the due date and issue reminders
8. process all information in accordance with the provisions of the relevant data protection legislation

---

## Knowledge and understanding

*You need to know and understand:*

1. the relevant codes of practice, legislation and regulations
2. the social and ethnic diversity and the needs of the communities which your organisation serves
3. relevant case law, judgements, regulations and guidance relating to local taxation and/or benefits, grants and relief schemes
4. the relevant data protection and freedom of information legislation
5. the differences, for taxation purposes, between domestic and non-domestic property and the different types of taxation on property
6. the different types of grants, benefit and relief applications and applicants
7. the relevant associated departments or offices, their roles, and how to work with them
8. the relevant organisational and external agency requirements and procedures for obtaining and exchanging information
9. the methods of recording and retrieving data and the importance of maintaining records
10. the local authority procedures for ensuring the security and confidentiality of information
11. the relevant internal and external audit requirements

<b>Developed by</b>	Instructus
<b>Version Number</b>	1
<b>Date Approved</b>	March 2019
<b>Indicative Review Date</b>	January 2024
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	ASTPS3
<b>Relevant Occupations</b>	Assistant Housing Administrator; Assistant Property Officer/Manager; Benefits Officer; Customer Service Assistant; Housing Administrator; Housing Assistant; Housing Manager; Housing Officer; Lettings Negotiator; Revenue Officer/Assistant; Taxation and Benefits Officer/Assistant
<b>Suite</b>	Administration of Local Revenues and Benefits
<b>Keywords</b>	customers; support; services; agreements; legislation; documentation; social inclusion; process; resolve disputes; compliance