

## Overview

This standard is about signing up customers to different types of occupancy agreements. This includes tenancy, licence or leaseholder agreements\*. It is about completing all relevant documentation, ensuring the customers understanding of the process and dealing with any problems which may occur.

\*Leaseholder agreements do not apply in Scotland.

## Performance criteria

*You must be able to:*

1. use the relevant documentation for the type of occupancy agreement being proposed
2. complete the relevant agreement documentation in accordance with organisational procedures
3. enter relevant data into your organisational management information systems
4. explain the content and requirements of the agreements to customers and confirm that customers understand and agree with the terms and conditions
5. confirm that all agreement documentation is signed and distributed in accordance with your organisational requirements
6. explain your organisational appeals and complaints procedures to the customer
7. confirm that customers are satisfied with the accommodation, services and facilities provided under their agreements
8. undertake required follow up action in accordance with organisational procedures
9. take the required action to rectify problems identified by customers
10. refer customers to relevant colleagues and organisations if you are unable to provide further assistance
11. record the outcomes of follow up actions in accordance with your organisational policy and procedures

## Knowledge and understanding

*You need to know and understand:*

1. the relevant documentation for different types of occupancy agreements
2. your organisational procedures and quality assurance systems covering agreements made with customers
3. the range of occupancy agreements in use in your organisation
4. how to complete the relevant documentation in line with organisational procedures
5. the relevant legal rights and responsibilities of customers in relation to the occupancy agreement, including their entitlement to receive copies
6. the requirement to protect confidentiality in accordance with the relevant data protection legislation
7. the relevant legal conditions under which occupancy conditions can be changed
8. your organisation's appeals and complaints procedures
9. your organisation's procedures for follow up actions
10. your organisation's procedures for dealing with problems identified by customers
11. the relevant procedures and legislation covering the enforcement of tenancy conditions

Complete relevant documentation for occupancy agreements

<b>Developed by</b>	Instructus
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<b>Indicative Review Date</b>	January 2024
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	ASTH308
<b>Relevant Occupations</b>	Assistant Portfolio Manager (without portfolio); Revenue Officer/Assistant; Resident Involvement Assistant; Repairs Assistant; Housing Assistant; Housing Administrator; Housing Manager; Housing Officer; Neighbourhood Assistant; Lettings Assistant; Lettings Negotiator
<b>Suite</b>	Housing
<b>Keywords</b>	property; permanent; temporary; emergency; accommodation; tenancy; licence; leaseholder; agreements; customers; documentation; safety; support; legislation; equality; diversity; safe; organise