
Overview

This standard is about providing information and advice to customers on the purchase of property. Properties for sale include general sales as well as those which are part of low cost home ownership or shared ownership schemes. It is also about ensuring that customers can afford to buy the property and that they fully understand the financial commitment they will be making.

Note that the role of the Scottish legal system is different for purchasing property than in the rest of the UK.

Performance criteria

You must be able to:

1. communicate with customers who intend to purchase property
2. provide information on the services offered by your organisation to customers wishing to purchase property
3. provide advice, information and support to customers about the relevant processes, financial commitment and ongoing responsibilities involved in making a property purchase
4. provide customers with relevant information on other organisations and agencies that can offer help and support
5. follow your organisational procedures covering property sales and customer service
6. use the relevant documentation for the type of sale being proposed
7. gather information from the customer on their relevant personal circumstances to confirm that purchasing the property is their best option
8. identify problems when obtaining the required information and take action to resolve them
9. complete and distribute documentation in accordance with your organisation's procedures
10. explain the content and requirements of the agreements to confirm that customers understand and agree with the relevant terms and conditions
11. confirm that all agreement documentation is signed in accordance with your organisational requirements
12. comply with all relevant legislation, codes of practice and organisational guidelines for the purchase of property

Knowledge and understanding

You need to know and understand:

1. your organisational procedures for processing property sales
2. your organisational procedures and schemes for low cost home ownership and/or shared ownership
3. how to adjust your communication style with customers to meet their requirements
4. the range and requirements of potential customers who intend to purchase property
5. the types of organisations and agencies to which customers might be referred, including their roles, remits and referral systems
6. how to verify evidence provided by customers to confirm they can afford to buy the property
7. how your organisation must comply with the relevant data protection legislation for recording information on sales processes and individual customers
8. the extent and limits of your own role and responsibility
9. the types of problems which occur when purchasing property
10. the relevant legislation, codes of practice and organisational guidelines related to property sales

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Originating Organisation Instructus

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Relevant Occupations Assistant Portfolio Manager (without portfolio); Repairs Assistant; Revenue Officer/Assistant; Resident Involvement Assistant; Housing Assistant; Housing Administrator; Housing Officer; Housing Manager; Neighbourhood Assistant; Lettings Assistant; Lettings Negotiator

Suite Housing

Keywords property; investigating; dealing; breaches; accommodation; tenancy; licence; leaseholder; agreements; customers; documentation; safety; support; legislation; equality; diversity; safe; organise
