

Overview

This standard is about setting up agreements for different types of occupancy - tenancy, licence and leaseholder*. It is about assisting customers to provide the required information and completing agreement documentation in line with current principles, practices and legislation, as well as responding to customer queries.

*Leaseholder agreements do not apply in Scotland.

Performance criteria

You must be able to:

1. determine the relevant type of occupancy agreement to be set up
2. confirm the relevant legal nature of the agreement being set up and the rights and responsibilities of both housing service and tenant, following organisational procedures
3. provide customer service which meets your organisational standards and equality and diversity policy
4. identify customers' requirements for information and support and refer them to relevant colleagues or organisations
5. explain the content and requirements of agreements and relevant documentation to customers, responding to queries and concerns about the process
6. confirm that customers understand and that the services being provided to them meet the requirements of the occupancy agreement
7. explain your organisation's appeals and complaints procedures to the customer
8. use the relevant documentation for the type of occupancy agreement being proposed
9. complete all agreement documentation in line with organisational and legal procedures
10. complete, or if in line with your organisational procedures, pass on documentation to relevant colleagues for entry into your organisation's management information systems
11. refer customers to colleagues if you are unable to provide further assistance
12. undertake any required follow up actions in line with organisational procedures

Knowledge and understanding

You need to know and understand:

1. your organisational customer service standards and equality and diversity policy
2. the relevant legislation and your organisation's procedures for dealing with occupancy agreements
3. your organisational procedures and quality assurance systems covering occupancy agreements
4. the range of occupancy agreements in use
5. how to set up the relevant occupancy agreement and complete the required documentation
6. the relevant legal rights and responsibilities of both the housing service and the tenant in relation to the agreement
7. your organisation's appeals and complaints procedures
8. your organisation's procedures for follow up actions
9. your organisation's procedures for dealing with problems identified by customers

Set up occupancy agreements

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| Originating Organisation | Instructus |
| Original URN | ASTH210 |
| Relevant Occupations | Assistant Portfolio Manager (without portfolio); Housing Assistant; Housing Administrator; Neighbourhood Assistant; Lettings Assistant; Lettings Negotiator; Resident Involvement Assistant; Repairs Assistant; Revenue Officer/Assistant |
| Suite | Housing |
| Keywords | customers; colleagues; support; vulnerable; information; data confidentiality; customer confidentiality; online; services; stakeholders; tenancy; licence; leaseholder; agreements; legislation; documentation; queries; accommodation |