

## Overview

This standard is about supporting clients to make use of available services. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by community social welfare advice providers and others.

The standard covers enabling clients to decide on whether to use services or not, agreeing how they will use services and identifying and providing information as needed to clients.

## Performance criteria

### *You must be able to:*

1. comply with all relevant legal, professional and organisational requirements, policies, procedures and guidelines when supporting clients to make use of services
2. clarify clients' expectations and understanding of services
3. identify information about services in line with the needs of clients
4. discuss with clients the range of services available and the advantages and disadvantages of each according to their preferences
5. explore with clients reasons for their requirements
6. provide information about services to help clients decide whether or not their requirements can be met
7. encourage clients to clarify their requirements and circumstances in line with their needs
8. agree appropriate ways in which services may be used by clients
9. explain next steps to clients in line with their needs
10. confirm information required and agree with clients appropriate methods and timescales for providing information
11. retrieve information required by clients in line with organisational requirements
12. confirm with the clients that information provided is sufficient and appropriate to meet their requirements
13. address problems arising from providing information to clients in line with organisational procedures
14. signpost and/or refer clients to appropriate additional or alternative sources of information or services in line with their requirements
15. record information discussed with clients using systems in line with organisational requirements

## Knowledge and understanding

### *You need to know and understand:*

1. legislation, codes of practice, organisational requirements, policies and procedures relevant to your role and responsibilities
2. the importance of complying with relevant legal, professional and organisational requirements, policies, procedures and guidelines relevant to your role
3. how to encourage clients to express themselves and their requirements
4. different methods of communication and how to adapt them to suit the needs, preferences, and accessibility requirements of clients, ensuring inclusive practices.
5. types of information that should be obtained from clients
6. the range of information and services and how to access them
7. what information and services are appropriate for different clients
8. how to assess information and ensure it is accurate and up to date
9. how to present different types of information to clients in accessible formats
10. how to help clients decide whether their requirements can be met by services
11. how to address different expectations of clients and any arising difficulties or conflicts
12. issues that may occur when using different services for different clients
13. why it is important to confirm clients' requirements and how to match services to these
14. how clients may wish to use services and procedures for using them
15. what actions could be taken for different clients and how to explain them
16. types of information clients seek and different reasons they have for seeking it
17. how to assess clients' requirements and the importance of confirming information required and timescales
18. different methods available for providing accessible information, formats used to present it and how to check clients' understanding of information
19. why it is important to check clients have received the information they require and that it is sufficient and appropriate
20. types of problems that may arise when providing information to clients and how to deal with them
21. organisational and legal recording requirements, including how to store recorded information securely
22. workplace requirements on equality, diversity and inclusion.

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23. trauma informed principles and safeguarding requirements

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Support clients to make use of services

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**Relevant Occupations** Education and Training, Health, Public Services and Care, Housing Advisors, Public Service Professionals

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**Suite** Advice and Guidance

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