

## Present cases for clients in formal proceedings

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### Overview

This standard is about presenting cases for clients in formal proceedings. 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 welfare professionals and others.

The standard looks at reviewing the outcomes of formal proceedings as well as the options available for further advocacy proceedings.

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### Performance criteria

You must be able to:

1. check that appropriate people, documentation and associated materials are available for cases
2. prepare case material for presentation in accordance with organisational requirements
3. review information/cases to ensure that all relevant information is available
4. present cases for clients in accordance with organisational requirements
5. identify errors in information for formal proceedings relating to clients
6. counter arguments or disagreements of opposing parties in line with the needs of clients
7. take action to address problems identified with formal proceedings in line with organisational requirements
8. review outcomes of formal proceedings with clients in ways that meet clients' needs
9. explain the outcomes of formal proceedings to clients in ways that meet clients' needs
10. clarify responses of formal proceedings to clients in ways that meet clients' needs
11. explain consequences of outcomes to clients and others in ways that meet clients' needs
12. identify objectives that have been achieved for formal proceedings and those that have not in accordance with organisational requirements
13. identify options and requirements for continuing advocacy processes in line with the needs of clients
14. comply with all the relevant legal, professional and organisational requirements and guidelines for formal proceedings
15. record details of formal proceedings in accordance with organisational requirements

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### Knowledge and understanding

You need to know and understand:

1. the importance of complying with relevant legal, professional and organisational requirements and guidelines
2. legislation, codes of practice, organisational policies and procedures in relation to job role/activities undertaken
3. different methods of communication and how to adapt them to suit the needs and preferences of the clients
4. what and who should be available at different stages of cases
5. information that should be passed to others in relation to formal proceedings
6. how to present cases and information that should be included in presentations
7. how to address and challenge the following;
  - 7.1 any errors
  - 7.2 arguments that could occur
  - 7.3 any other problems
8. the importance of addressing problems and why it is important to address them
9. how to obtain information on requirements for formal proceedings
10. outcomes of formal proceedings that require explanation
11. types of responses that may be raised by other parties
12. likely consequences of outcomes and the objectives being sought
13. expectations of different clients in relation to formal proceedings
14. types of further action that might be taken in relation to formal proceedings
15. when the advocacy process should be concluded and who might initiate further action
16. recording requirements of your organisation, including how to store recorded information securely

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