



## **S6 Client orientation, support and referral procedures**

These procedures cover client orientation, internal support services and referral assistance to external guidance and welfare services.

### **This procedure complies with Standards:**

Standards for Registered Training Organisations (RTOs) 2015

The Registered Training Organisation adheres to principles of access and equity and maximises outcomes for its clients.

### **Procedures**

#### **Make the appointment**

- Develop a duty statement for person with overall responsibility for client welfare services within the organisation.
- Designate a person, (the Chief Executive Officer), to have overall responsibility for client welfare.
- Confirm appointment by letter clearly setting out their roles and responsibilities.
- Include position on organisational chart showing direct responsibility of Chief Executive Officer.

#### **Duties of Client Support and Welfare Officer**

- Establish and maintain a list of local support and welfare services
- Develop and update *Client Handbook*
- Participate in client orientation sessions
- Provide support and guidance to clients as required.
- Refer clients to local support and welfare services as required

### **Client orientation**

- Review client files and identify any special needs (*e.g. housing issues, financial problems, personal or family difficulties, physical or intellectual limitations, language, literacy and numeracy requirements, etc.*)
- Plan agenda for client orientation session including some or all of the following items:
  - introductions to trainers, staff and other clients
  - information on facilities, equipment and resources
  - course timetable
  - flexible learning and assessment strategies
  - organisational policies and procedures relating to clients (*e.g. OH&S, Complaints, Grievances and Appeals, Mutual recognition obligations, etc.*)
  - government requirements regarding management of overseas students
  - client support and welfare services
  - question and answer session

### **Educational support and referral**

- Identify need for educational support and referral
- Discuss nature and extent of assistance required with client and trainer
- Identify appropriate sources of help and support
- Assess whether referral to outside agency is required
- Negotiate extra curricular learning program with client to support their training program study
- Arrange client's extra curricular learning program at client's expense
- Record details of extra curricular learning program in client's file
- Provide follow up meeting with client and trainer to support and assess client's progress
- Record results of extra curricular learning program in client's file

### **Client Welfare support and referral**

- Make available copies of *Client Handbook* and *Code of Practice* in library.
- Ensure clients know who to approach in the organisation for support and guidance (orientation session, notice board, *Client Handbook*)
- Identify welfare need of individual client requesting assistance
- Identify appropriate sources of help and support
- Assess whether referral to outside agency is required
- Take appropriate action to meet clients need
- Record nature of enquiry and suggested action in individual client's file.
- Provide on-going support to client
- Record outcome of action taken in individual client's file

**Policies influencing this procedure:**

S6.14 Access and Equity Policy

S6.15 Client Services Policy

Code of Practice

**Review Date**

This procedure should be periodically reviewed and revised. Revisions should be made as and when required. The period between reviews must not exceed 5 yrs. The date for review of this procedure is on or before December, 2026.

**Authorised By**

**Signature:** .....

**Name:** Wayne Smith

**Position:** Chief Executive Officer of Learning Systems Australia Pty Ltd

**Date:** .....