Advanced Accreditation Competency Framework

How to Use This Framework

This competency framework is designed to help you understand what competent advanced practice looks like across each of the eight competency areas.

When preparing your application, read through each competency description carefully and understand what is being measured.

Review your own practice and case files honestly, identifying examples that demonstrate the positive indicators.

Where you find gaps - areas where you do not yet demonstrate the positive indicators - use this as a learning opportunity and focus on developing these areas.

Gather evidence from the Examples of Evidence section for each competency that supports your demonstration.

Organise your evidence folder into eight sections, one for each competency, making it easy for assessors to locate evidence for each area.

- The full competency description and detailed breakdown
- Positive and negative indicators to evidence competent versus non-competent practice
- Examples of evidence that could support your application
- Guidance on the types of cases, decisions, and records assessors expect to see
- A clear structure to help you present a comprehensive evidence portfolio

Remember: the purpose of Advanced Accreditation is to recognise expertise at the highest level.

Assessors will be looking for evidence of consistent, sophisticated, and reflective practice across all eight competencies.

ALL EIGHT competencies must be demonstrated, and assessors need to see that you meet the advanced standard right across your practice.

When preparing your evidence portfolio, consider how your case examples, records, and practice demonstrate the positive indicators for each competency.

Assessors will look for concrete evidence of advanced practice across all eight areas.

Summary of the Core Competencies

No	Core Competency	Description
1	Qualification, Skills And Experience	Candidates must demonstrate appropriate legal qualification and experience in managing an individual's property and affairs.
2	Ethical And Professional Conduct	Candidates must demonstrate they act with integrity, impartiality, and transparency and adhere to professional and legal standards, manage conflicts of interest, and maintain accountability to the Court, the OPG and regulatory bodies.
3	Client-Centred Services	Candidates must ensure that any actions and decisions they take on behalf of a supported individual reflect the wishes, feelings, beliefs and values of the individual in line with the Mental Capacity Act 2005.
4	Working With Others	Candidates are required to evidence how they work collaboratively and effectively with a supported individual and a range of third parties to deliver co-ordinated and holistic support for a client.
5	Problem Solving And Critical Thinking	Candidates are required to evidence that they can effectively problem solve client matters and address complex matters in a coherent and logical manner, ensuring the client remains central to the decision making.
6	Effective Case Management	Candidates are required to evidence effective case management administratively and through leadership, delegation, supervision and case load and capacity management.
7	Financial Management And Property Management	Candidates are required to evidence that they can manage and organise an individual's property and finances effectively.
8	Care Management And Safeguarding	Candidates are required to evidence that they can plan for care to be delivered effectively to a client, within the remits of their role. This includes the organisation of care, mitigating risks around exploitation, neglect, coercion and abuse, and implementing protective and preventative measures in line with safeguarding best practices.

Competency 1: Qualification, Skills and Experience

Candidates must be able to evidence that they have adequate experience and skill to act in the capacity of a professional deputy for property and affairs, at an advanced level. Candidates must be able to demonstrate appropriate qualification, legal and regulatory knowledge and experience, in line with the below:

Qualification

- Hold a recognised professional qualification (e.g. Solicitor, Chartered Legal Executive) regulated by the SRA, CILEX, or equivalent.
- Have at least 8 years post-qualification experience (PQE) and are working at Grade A level.
- It is not essential that candidates are actually appointed as professional deputy or as a trustee of a trust corporation.
- Be a Senior or Deputy Professional Deputies Forum (PDF) member.
- Provide evidence of having completed the intermediate level of accreditation (or equivalent experience in the core areas of practice relevant to their role).

Legal and Regulatory Knowledge

- Demonstrate a high-level understanding and application of the Mental Capacity Act 2005, its Code of Practice.
- Takes ownership and responsibility for keeping informed of case law, guidance and other legal developments.
- Apply the Court of Protection Rules and Office of the Public Guardian (OPG) Deputy Standards appropriately in their practice.
- Comply with Data Protection (GDPR) requirements and maintain client confidentiality.
- Demonstrate good knowledge and adherence to the accounting rules and regulatory requirements of their professional body (e.g. SRA, CILEX).

Experience

- Evidence that Property and Affairs deputyship work constitutes at least 75% of their professional practice.

Provide evidence of appointment as a professional deputy or as a Director of a trust corporation, or alternatively demonstrate 8 years of qualification and experience at Grade A level.

Positive Indicators ✓	Negative Indicators ✗
• Current, valid professional qualification clearly evidenced (e.g. practising certificate) • 8+ years PQE and working at **Grade A** level • Holds formal Senior or Deputy member status with PDF • Court orders appointing the applicant as Deputy • Demonstrates confident and accurate application of **Mental Capacity Act 2005**, Code of Practice, Deputy Standards across case studies • Demonstrates good knowledge and adherence to the accounting rules • Court of Protection applications and orders show appropriate understanding of jurisdictional scope and authority and the applicant is informed of developing areas of practice i.e. ACC applications • Caseload composition shows property and affairs work at or above 75% threshold • References confirm depth of legal knowledge and practical expertise • Training records demonstrate commitment to staying up to date with legal developments and case law	• Professional qualification unclear, outdated, or not independently verified • Experience evidence lacks depth or complexity in managing deputyship matters suitable for management at **Grade A** level • No evidence of appropriate member status with PDF • No application of **Mental Capacity Act 2005**, Code of Practice, Deputy Standards across case studies • Court of Protection applications show lack of clarity on authority limits or jurisdictional boundaries • Property and Affairs work forms less than 75% of practice • References express concerns about depth of legal knowledge • CPD records sparse, outdated, or not aligned with deputyship practice

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Current practising certificate or proof of professional qualification
- CV and career history clearly demonstrating 8+ years PQE
- PDF membership confirmation (Senior or Deputy level)
- Case studies demonstrating complex deputyship matters suitable for **Grade A** oversight
- Court of Protection applications and orders
- Training records for the last 2 years and evidence of any other qualifications and memberships
- Breakdown of caseload by case type (% Property and Affairs)
- Reference statements from senior colleagues

Competency 2: Ethical and Professional Conduct

Candidates must demonstrate they act with integrity, impartiality, and transparency and that they adhere to professional and legal standards, manage conflicts of interest, and maintains accountability to the Court, the OPG and their regulatory body. Candidates must be able to evidence: Act reasonably, proportionately, honestly, and with integrity in all professional matters. Manage conflicts of interest and ethical dilemmas competently and transparently. Uphold their duty of accountability to the Court, the OPG, and relevant regulatory bodies and adhere to behavioural expectations set down in the professional deputy standards. Operate within their level of expertise, seeking professional or other third party advice or escalation where necessary. They demonstrate awareness of fiduciary duties and manage potential conflicts of interest appropriately. They ensure appropriate security and protection is in place (bonds and indemnity insurance) and that action is taken to revise security levels where required. Resolve disputes and professional challenges fairly and professionally. They declare that they have no pending or upheld investigations or disciplinary actions. Adhere strictly to applicable professional standards and codes of conduct (e.g. SRA, CILEx, or others relevant to their profession). Demonstrate good knowledge and adherence to the accounting rules and regulatory requirements of their professional body.

Positive Indicators ✓	Negative Indicators ✗
• Decision records show consistent ethical reasoning and clear justification for actions taken • Evidence of transparent conflict of interest identification and appropriate management in case files • Proactive escalation of matters to the Court when required • Demonstrates that the seek appropriate advice from specialists (solicitors, accountants, etc.) when matters are outside of their expertise • Maintains accountability through regular reporting to Court and compliance with OPG standards • Insurance and bond documents current and appropriate for cases held • Evidences appropriate applications for revision of security levels at appropriate stages of a case • Provides evidence of any disputes with clients or family, and how these were managed appropriately • Clear declaration of no pending or upheld investigations or disciplinary action • References confirm professional integrity and ethical practice	• Decision rationale unclears or absent; ethical reasoning not evident • Conflicts of interest not identified or managed transparently • Frequent internal referrals with no evidence of ACC considerations • Decisions favour personal convenience and accessing costs, over client's best interests • Operates beyond expertise without seeking appropriate advice • Accountability weak – OPG reporting sparse or incomplete • Insurance or bond documentation inadequate or outdated • Declarations unclear; any hint of pending investigations or disciplinary action • References express concerns about ethical practice or integrity

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Declaration form: no pending or upheld investigations or disciplinary actions
- Case file samples showing ethical decision-making and conflict management
- Best interest decision documentation with clear reasoning
- Evidence of escalation to Court or OPG on appropriate matters
- Correspondence seeking specialist advice
- Insurance policy, bond certificates and security review applications (current)
- Examples of how conflicts of interest were managed in applicants case studies

Competency 3: Client-Centred Services

Candidates must ensure that any actions and decisions they take on behalf of a supported individual, reflect the wishes, feelings, beliefs and values of the individual in line with the Mental Capacity Act 2005. Candidates must evidence that they: Consistently apply the principles of the **Mental Capacity Act 2005** in all decision-making, promoting independence, respecting autonomy, acknowledging a decision could be unwise, and prioritising client wishes and best interests. They facilitate decision making as much as possible even within the overall framework of the MCA 2005. Demonstrate that they keep a supported individual's capacity under regular review and whether there is indeed an ongoing need for a professional deputy. Work and communicate empathetically and collaboratively with clients, their families, and care teams to support holistic, person-centred care. Communicate clearly, compassionately, and openly with the supported individual, anyone engaged in caring for the person or with an interest in their welfare, and all professionals involved in the client's care. Adapt services flexibly to meet the individual needs of the supported individual, ensuring accessibility and inclusivity. Build and maintain trust with key stakeholders through transparency, reliability, and respect. Resolve disputes professionally and in the best interests of the supported individual, balancing competing views fairly. Advocate effectively for the supported individual's best interests, negotiating positively with all involved parties. Maintain continuity of care and support by retaining clients and ensuring consistent service quality. This includes demonstrating effective review and management of their capacity to manage a case load in a way that serves a supported individuals best interests. Demonstrate regular and appropriate engagement with the supported individual, including visiting where required. Where visits are more frequent, evidencing how this is justified.

<table>
<tr><th>Positive Indicators ✓</th><th>Negative Indicators ✗</th></tr>
<tr><td>
Capacity assessments and reviews documented regularly; decisions reflect current capacity status
Case files show regular contact with supported individual (visits, calls, correspondence) and where this is more frequent, the reasoning is justified
Supported individual's wishes, feelings, and values clearly documented and reflected in decisions
Communication is clear, jargon-free, and accessible
Multi-disciplinary meetings attended; collaborative plans developed with family and professionals
Examples show advocacy for client wishes even when they conflict with risk-averse approaches
Relationships maintained with clients with low turnover, evidence of consistency and trust-building
Regular review of whether deputyship remains necessary, and evidence of encouraging independence
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Capacity assessments absent or outdated; ongoing need for deputyship not reviewed
Limited contact with supported individual; visits infrequent or undocumented
Decisions in case studies and records appear risk-averse and/or black and white
Communication is clinical or legal jargon-heavy and there is no evidence of accessibility adaptations
Reactive rather than collaborative approach with family and professionals
Paternalistic practice and client wishes are overridden by 'best interest' decisions making
High client turnover; no evidence of trust-building or relationship maintenance
No evidence of reviewing whether deputyship remains necessary
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Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Capacity assessment documents (baseline and reviews)
- Visit records with dates, contact, and outcomes documented
- Client communication samples (letters, emails) showing clear, accessible language and or alternative tools
- Best interest decision documents reflecting client wishes and feelings
- Examples of how client preferences influenced decisions
- Multi-disciplinary meeting notes showing collaborative planning
- Family communication records and evidence of engagement
- Case file reviews showing consistency of care and relationship maintenance

Competency 4: Working with Others

Candidates are required to evidence how they work collaboratively and effectively with a range of professionals (e.g., care providers, financial providers, case managers, local authorities) to deliver coordinated and holistic support for a supported individual. Candidates must evidence that they: Develop, implement, and coordinate comprehensive plans that effectively address the supported individual's needs, demonstrating professionalism and responsiveness throughout the process. Facilitate multi-agency working by coordinating input from health, social care, education, housing, financial, and legal professionals, ensuring all relevant parties are informed, engaged, and contributing to the supported individual's best interests. Collaborate proactively and constructively with key stakeholders, including healthcare professionals, and other relevant parties. Managing expectations sensitively and realistically, providing clear explanations of deputyship responsibilities, court limitations, and the scope of decisions. Candidates must show how they balance empathy with honesty to build trust and maintain constructive relationships Demonstrate effective communication and active listening skills, both orally and in writing, ensuring clear, respectful, and timely information sharing with all involved parties.

Positive Indicators ✓	**Negative Indicators ✗**
• Care/support plans developed appropriately • Inputs in multi-disciplinary meetings and decision making appropriately and within their remit as a property and affairs deputy • Proactive and respectful communication with key stakeholders • Manages expectations clearly • Any disputes are resolved professionally through respectful negotiation • Written communication and instructions are clear, professional, and prompt • Demonstrates active listening and understanding of others' perspectives • Information shared appropriately and regularly • Positive feedback from referees about collaboration	• Plans developed in isolation and little evidence of multi-agency coordination – for example leading in areas where a deputy should not be such as clinical decisions • Communication sporadic or poor and relationships appear strained or distant • Disputes not resolved constructively and conflicts escalate inappropriately • Written communication unclear, delayed, or infrequent • Poor listening skills and does not adequately consider others' perspectives • Information withheld or shared inappropriately – for example other professionals excluded • Negative feedback from referees

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Care/support plan documents showing multi-agency input and evidence of how the deputy has inputted
- Multi-disciplinary meeting notes and attendance records evidencing deputy joint working
- Clear correspondence with healthcare, social care, housing, and financial professionals e.g instruction letters
- Testimonials or feedback from other professionals
- Examples of how different professional perspectives were balanced
- Communication records showing timely, clear information sharing

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Competency 5: Problem Solving and Critical Thinking

Candidates are required to evidence that they can effectively problem solve client matters and address complex matters in a coherent and logical manner, ensuring the supported individual remains central to the decision making. Candidates must evidence that they: Identify and analyse complex problems facing the supported individual, taking into account legal, capacity, financial, health, and social care considerations. Ensure that the supported individual's views, wishes, beliefs and values remain central throughout the problem-solving process, advocating for their best interests at every stage. Develop and implement clear, structured strategies and action plans to progress the management of an individual's affairs and resolve complex matters, demonstrating a logical and methodical approach. Recognise and distinguish between health and welfare matters and the remit of a property and affairs deputy's authority, ensuring actions remain within their authority. Recognise that there will be occasions where matters lie outside of their authority even as a property and affairs Deputy – for example, a person may have capacity, the decision to be made may be one for the Court to make or it falls outside of the scope of the MCA 2005. Consider multiple options and assess associated risks and benefits to determine the most appropriate course of action in the supported individual's best interests. Collaborate effectively with other professionals (e.g., legal advisors, case managers, care providers) to coordinate comprehensive and cohesive solutions. Document the problem-solving process and decisions clearly and comprehensively, including action plans, meeting notes, correspondence, and reflections on outcomes. Reflect on their problem-solving approach, demonstrating learning and continuous improvement in managing complex client matters.

Positive Indicators ✓	Negative Indicators ✗
• Complex case studies demonstrate logical, structured analysis of multi-faceted issues • Clear case plans which evidence forward thinking and development around an individual's affairs with regular monitoring • Case strategy is proportionate and multiple options are evaluated • Client's wishes documented and clearly reflected in chosen course of action • Recognises boundaries of authority and escalates appropriately to the Court for further authority and/or alternative stakeholders • Collaborative problem solving evident and involves relevant professionals • Case studies evidence learning from complex matters	• Problem analysis superficial and does not consider multiple factors or perspectives • Single option and/or strict approach and no evidence of considering alternatives or creative thinking • Client wishes not central to decision and paternalistic reasoning evident • Decisions and actions appear to be reactive rather than strategically planned • Operates beyond authority without Court involvement or proper escalation • Risk analysis absent or inadequate and decisions appear ill-considered • Works in isolation and does not seek specialist advice or multi-disciplinary input • Case records lack clear documentation of reasoning

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Complex case study presented with multiple issues presenting
- Case plans and strategy evidence
- Court of Protection applications and witness evidence, showing sophisticated analysis of particular issues and management
- Support planning records showing structured problem solving
- Best interest decision documentation with clear multifactor analysis
- Examples of escalation to Court appropriately
- Correspondence seeking specialist advice (legal, financial, health)

Competency 6: Effective Case Management

Candidates are required to evidence effective case management administratively and through leadership, delegation, supervision and case load and capacity management. Candidates must evidence: They demonstrate effective case management, ensuring all aspects of the supported individual's affairs are organised, monitored, and progressed in a timely and efficient manner. They demonstrate future planning in relation to managing the supported individual's affairs. They implement robust administrative systems (including accurate record keeping, case tracking, and management of deadlines) to support efficient and compliant practice. They ensure that case load is manageable and does not impact on client service delivery. They exhibit leadership in managing cases, showing initiative in identifying priorities, setting objectives, and driving progress on behalf of the supported individual. They effectively delegate to manage costs in the supported individual's best interest. They delegate tasks at the appropriate level, and effectively to team members or external professionals, ensuring that delegation is clearly documented, monitored, and reviewed to maintain quality and accountability. They provide effective supervision of team members, including oversight of delegated tasks, guidance on complex issues, and support for professional development where appropriate. They collaborate with other professionals involved in the case and/or can identify when this is required, ensuring effective coordination and clear communication across all aspects of case management. They maintain a focus on the supported individual's capacity and best interests throughout the case management process, ensuring decisions are documented and that they comply with relevant legal and professional standards. They implement revised guidance and developments in this area of practice in a timely manner to ensure management of the supported individuals property and affairs is done so in line with the current law and guidance at all times.

Positive Indicators ✓	Negative Indicators ✗
• Candidates demonstrate organisation and methodical management of case work • Deadlines tracked and met and there is no evidence of missed Court dates • Caseload size appropriate for service quality and no evidence of overload impacting client care • Proactive case management - matters progressed systematically rather than reactively • Clear delegation records to the appropriate level, showing task allocation, timescales, and monitoring • Team structure and strategy is explained and evidenced • Team supervision records demonstrate oversight, guidance, and professional support • Evidence of planning ahead and anticipation of future needs and issues • Training records show timely adoption of new guidance and legal developments	• Papers enclosed are disorganised, incomplete, or difficult to navigate • Missed deadlines or Court dates • Caseload appears excessive, signs of rushing or incomplete attention to individual cases • Reactive approach - cases drift without systematic progression • Delegation unclears or unmonitored and accountability is not established • Supervision records absent or sparse and team oversight inadequate • Failure to anticipate issues and there is no evidence of forward planning • Slow adoption of new guidance and practice appears outdated

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Internal systems explained and where possible, evidenced, to support evidence of effective case management
- Delegation frameworks and records provided
- Supervision meeting notes and recordings
- Examples of new guidance/case law implementation
- Evidence of cost recovery at the appropriate level following SCCO assessment

Competency 7: Financial Management and Property Management

Candidates are required to evidence that they manage a supported individual's property and finances effectively. This includes, cash assets, and fixed assets. Candidates must evidence: Effective management and protection of property. Both liquid and fixed assets. Implementation of estate planning strategies that reflect the supported individual's circumstances and good general knowledge to address testamentary matters. A sound knowledge and understanding of investment processes and principles, including assessing risk levels and aligning investments with the best interests of the supported individual. Understand and manage taxation matters effectively on behalf of a supported individual, including compliance with relevant tax obligations and ensuring tax efficiency where appropriate. Demonstrate knowledge of welfare benefits, care funding, and other income sources, ensuring the supported individual receives all entitlements and funding opportunities available whilst also being mindful of the potential for a conflict of interests that may arise. they demonstrate an understanding of the rules, laws and regulations that may affect client income. They operate within the authority granted by the Court, taking appropriate action to seek extensions or additional authority when required. Protects clients from financial exploitation and implements appropriate safeguards, legally and practically. They are able to evidence clear and effective budgeting, forecasting, and reporting and can evidence how they keep financial structuring under regular review.

Positive Indicators ✓	Negative Indicators ✗
• Financial accounts clear, accurate, and regularly reviewed • Budgets prepared and monitored and forecasting accurately anticipate future needs • Affordability and sustainability considerations are clear • Estate planning strategies documented • Testamentary capacity reviewed and client wishes reflected in decisions • Appropriate instructions to financial advisors and accountants • Strategies considered and implemented to maximise client's income • Investment portfolio reviewed regularly and decisions reflect risk assessment and client circumstances • Funds managed appropriately and within FSCS protection limits • Tax compliance evident and returns filed on time and liabilities met • Evidence of tax efficiency planning • Welfare benefits reviews demonstrated and clients receives all benefits to which they are entitled • Advice sought on appeals • Court authority clearly understood and extensions sought appropriately • Safeguarding measures in place and financial exploitation risks mitigated • Clear records of property and management strategies in place	• Financial records incomplete, inaccurate, or outdated • No evidence of estate planning and testamentary matters not addressed • Investment decisions not documented, no evidence of informed decision-making and conflict management • Tax compliance unclear - returns may be filed late or incorrectly • Client missing entitlements and benefits not maximised • Mixing of client funds FSCS limits exceeded on accounts • Funds held on client account for long periods of time with not justification • No budgets or forecasts and financial planning is reactive • Authority limits unclear and decisions may overstep Court remit • Safeguarding weak and financial exploitation risks not identified or managed • No records for property management

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Annual accounts and budgets
- Evidence of financial advice and strategy
- Tax returns and compliance documents
- Welfare benefits review showing all entitlements claimed
- Estate planning documents
- Property valuations and maintenance records

Competency 8: Care Management and Safeguarding

Candidates are required to evidence that they can plan for care to be delivered effectively to a supported individual. This includes the organisation of care, mitigating risks around exploitation, neglect, or abuse, and implementing protective and preventative measures in line with safeguarding best practices. Candidates must evidence they: Candidates must evidence that they: They can instruct appropriate professionals to organise and coordinate care delivery to meet the supported individual's needs, ensuring care providers are appropriately qualified and services are tailored to the client's preferences, needs and best interests. Identify, assess, and manage risks related to care provision, including financial exploitation, neglect, abuse, coercive control or other safeguarding concerns, implementing protective measures in line with best practice. Work within the remit of their authority, consulting with relevant stakeholders such as family members, anyone engaged in caring for the person or with an interest in their welfare, healthcare professionals, and local authorities to inform care decisions. Maintain oversight and regular review of care arrangements to ensure ongoing appropriateness, safety, and quality of care delivery, whilst operating within the remits of their authority. Communicate effectively with care providers, anyone engaged in caring for the person or with an interest in their welfare., and other stakeholders to monitor the supported individual's wellbeing and address any concerns promptly. Demonstrate knowledge of health and welfare best practices and safeguarding procedures relevant to the delivery of care and demonstrates an ability to spot welfare issues and seek authority of the Court to escalate these matter where that is required. Demonstrate an understanding of the potential for Deprivation of Liberty to arise and how they meet their duties in this respect. Navigate and manage funding arrangements appropriately, ensuring care provision aligns with financial authority and client entitlements. Manage any employment-related obligations and responsibilities arising from the delivery of care, including compliance with relevant employment laws and safeguarding requirements.

Positive Indicators ✓	Negative Indicators ✗
• Care providers and MDT are appropriately qualified and vetted and selection demonstrates due diligence • Deputies act within their remit, and consult with appropriate other professionals to manage care • Safeguarding risks identified proactively and managed appropriately, escalating to the correct stakeholders • DoLs compliance considered and acted upon, and applications made or advice sought where appropriate • Deputies manage any employment-related obligations and responsibilities arising from the delivery of care, in line with employment laws • Financial planning evident to support care delivery i.e. through access to appropriate income streams	• Care provider selection unclear and due diligence questionable • Safeguarding risks not identified and passive oversight of care • DoLs not considered or escalated to appropriate channels • Limited contact with care providers and concerns not escalated • Funding arrangements unclear and resource constraints not managed • Stakeholder consultation absent and decisions made unilaterally • Poor quality care not addressed or escalated

Examples of Evidence

The following are examples of evidence that could support your application. This is not an exhaustive list.

- Care provider vetting and selection documentation
- Risk assessments specific to safeguarding concerns
- Documents implemented to support financial independence of a client, whilst balancing risk
- Safeguarding referral documentation and case studies
- Evidence of employment management and strategies – HR engagement and care support services
- DoLs referrals and/or applications
- Stakeholder communication and involvement records