



## **Qualification Specification for OCN NI Level 3 Certificate in Generalist Advice**

➤ **Qualification No: 601/3234/6**

## Qualification Regulation Information

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Qualification Title: OCN NI Level 3 Certificate in Generalist Advice  
Qualification Number: 601/3234/6

Operational start date: 01 June 2014  
Operational end date: 31 December 2025  
Certification end date: 31 December 2028

Qualification operational start and end dates indicate the lifecycle of a regulated qualification. The operational end date is the last date by which learners can be registered on a qualification. The certification end date is the last date by which learners need to complete the qualification and claim their certificate.

All OCN NI regulated qualifications are published to the Register of Regulated Qualifications (<http://register.ofqual.gov.uk/>). This site shows the qualifications and awarding organisations regulated by CCEA Regulation and Ofqual.

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## Foreword

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This document explains OCN NI's requirements for the delivery and assessment of the following regulated qualification:

→ **OCN NI Level 3 Certificate in Generalist Advice**

This specification sets out:

- Qualification features
- Centre requirements for delivering and assessing the qualification
- The structure and content of the qualification
- Assessment requirements for the qualification
- OCN NI's quality assurance arrangements for the qualification
- Administration

OCN NI will notify centres in writing of any major changes to this specification. We will also publish changes on our website at [www.ocni.org.uk](http://www.ocni.org.uk)

This specification is provided online, so the version available on our website is the most up to date publication. It is important to note that copies of the specification that have been downloaded and printed may be different from this authoritative online version.

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## About Regulation

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### OCN NI

Open College Network Northern Ireland (OCN NI) is a regulated Awarding Organisation based in Northern Ireland. OCN NI is regulated by CCEA Regulation to develop and award professional and technical (vocational) qualifications from Entry Level up to and including Level 5 across all sector areas. In addition, OCN NI is regulated by Ofqual to award similar qualification types in England.

All OCN NI regulated qualifications are published to the Register of Regulated Qualifications (<http://register.ofqual.gov.uk/>). This site shows the qualifications and awarding organisations regulated by CCEA Regulation and Ofqual.

### The Regulated Qualifications Framework: an overview

The Regulated Qualifications Framework (RQF) was introduced on 1<sup>st</sup> October 2015: the RQF provides a single framework for all regulated qualifications.

#### Qualification Level

The level indicates the difficulty and complexity of the knowledge and skills associated with any qualification. There are eight levels (Levels 1-8) supported by three 'entry' levels (Entry 1-3).

#### Qualification Size

Size refers to the estimated total amount of time it could typically take to study and be assessed for a qualification. Size is expressed in terms of Total Qualification Time (TQT), and the part of that time typically spent being taught or supervised, rather than studying alone, is known as Guided Learning Hours (GLH).

## Qualification Features

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### Sector Subject Area

15.5 Law and Legal Services

### Qualification Aim

The OCN NI Level 3 Certificate in Generalist Advice qualification has been designed to develop skills of individuals to enable them to provide advice to others.

### Qualification Objectives

The objectives of the qualification are to enable learners to provide advice on a range of issues such as:

- benefits
- immigration
- consumer law
- money management

This qualification relates to the National Occupational Standards for advice and guidance [http://www.sqa.org.uk/files\\_ccc/A\\_G\\_NOS\\_FULL\\_Suite\\_2006.pdf](http://www.sqa.org.uk/files_ccc/A_G_NOS_FULL_Suite_2006.pdf)

### Grading

Grading for this qualification is pass/fail.

### Qualification Target Group

The qualification is aimed at individuals who wish to develop skills in the area of advice.

### Progression Opportunities

The OCN NI Level 3 Certificate in Generalist Advice qualification enables progression to corresponding degree level qualifications in this area or into related employment.

### Entry Requirements

There are no formal entry requirements. However, learners should seek appropriate advice about the suitability of the qualification prior to commencement. Learners should be at least 16 years of age.

### **Qualification Support**

A Qualification Support pack is available for OCN NI centres within the login area of the OCN NI website (<https://www.ocnni.org.uk/my-account/>), which includes additional support for teachers, eg planning and assessment templates, guides to best practice, etc.

### **Delivery Languages**

This qualification is available in English only at this time. If you wish to offer the qualification in Welsh or Irish (Gaeilge) then please contact OCN NI who will review demand and provide as appropriate.

## Centre Requirements for Delivering the Qualification

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### Centre Recognition and Qualification Approval

New and existing OCN NI recognised centres must apply for and be granted approval to deliver the qualification prior to the commencement of delivery.

### Centre Staffing

Centres are required to have the following roles in place as a minimum, although a member of staff may hold more than one role\*:

- Centre contact
- Programme Co-ordinator
- Tutor
- Assessor
- Internal Verifier

\*Note: A person cannot be an internal verifier for their own assessments.

### Tutors

Tutors delivering the qualification should be occupationally competent and qualified to at least one level higher than the qualification and have appropriate experience in the area of providing advice.

### Assessors

The qualification is assessed within the centre and is subject to OCN NI's quality assurance processes. Units are achieved through internally set, internally assessed, and internally verified evidence.

#### **Assessors must:**

- be occupationally competent at a higher level than the qualification
- have a minimum of one year's experience in the area they are assessing
- have direct or related relevant experience in assessment
- have a sound understanding of the current National Occupational Standards (NOS)
- assess all assessment tasks and activities



### **Internal Verification**

OCN NI qualifications must be scrutinised through the centre's internal quality assurance processes as part of the recognised centre agreement with OCN NI. The centre must appoint an experienced and trained centre internal verifier whose responsibility is to act as the internal quality monitor for the verification of the delivery and assessment of the qualifications.

The centre must agree a working model for internal verification with OCN NI prior to delivery of the qualification.

#### ***Internal Verifiers must:***

- have at least one year's occupational experience in the areas they are internally verifying
- attend OCN NI's internal verifier training if not already completed

Internal verifiers are required to:

- support tutors and assessors
- sample assessments according to the centre's sampling strategy
- ensure tasks are appropriate to the level being assessed
- maintain up-to-date records supporting the verification of assessment and learner achievement

## Structure and Content

### OCN NI Level 3 Certificate in Generalist Advice

Learners must successfully complete a total of 19 credits from the optional units below.

Qualification Time (TQT) for this qualification: 190 hours  
 Minimum Guided Learning Hours (GLH) for this qualification: 126 hours

Unit Reference Number	OCN NI Unit Code	Unit Title	TQT	GLH	Credit Value	Level
<b>Optional Units</b>						
<a href="#">K/506/2754</a>	CAZ788	Case Recording	30	21	3	Three
<a href="#">M/506/2755</a>	CAZ790	Consumer Law	10	6	1	Three
<a href="#">T/506/2756</a>	CAZ791	Disability Benefits	30	21	3	Three
<a href="#">A/506/2757</a>	CAZ792	Employment Law	10	6	1	Three
<a href="#">F/506/2758</a>	CAZ789	Advisor Immigration and Nationality	20	13	2	Three
<a href="#">J/506/2759</a>	CAZ793	Interview Skills	20	13	2	Three
<a href="#">A/506/2760</a>	CAZ794	Money Advice	10	6	1	Three
<a href="#">F/506/2761</a>	CAZ795	Welfare Benefits	60	42	6	Three
<a href="#">J/506/2762</a>	CAZ367	Understanding Personal Independence Payments	10	6	1	Three
<a href="#">L/506/2763</a>	CAZ366	Understanding Universal Credit	20	13	2	Three

Title	Case Recording
Level	Three
Credit Value	3
Guided Learning Hours (GLH)	21
OCN NI Unit Code	CAZ788
Unit Reference No	K/506/2754
<i>Unit purpose and aim(s):</i> This unit will enable the learner to perform case recording.	
Learning Outcomes	Assessment Criteria
1. Be able to record and maintain case notes.	1.1. Summarise and record key case information and actions undertaken for clients. 1.2. Review and revise case notes to ensure accuracy, appropriateness and clarity. 1.3. Comply with all relevant legislation, codes of practice, guidelines and ethical requirement.
2. Be able to establish priorities for dealing with personal caseload.	2.1. Develop criteria for setting priorities for cases and assess priorities. 2.2. Demonstrate effective time management skills. 2.3. Comply with all relevant legislation, codes of practice, guidelines and ethical requirements when making client referrals.
3. Be able to provide appropriate and accurate advice.	3.1. Evaluate possible options for action for presentation to clients. 3.2. Ensure the client has an accurate understanding of the advice offered. 3.3. Negotiate any further action that needs to be taken by you and/or the client. 3.4. Summarise client details and agreed actions using organisational procedures for recording and storing client details.
4. Be able to research information relevant to the client's situation.	4.1. Review and access sources of internal and external information relevant to the client's situation. 4.2. Ensure the information obtained is accurate and up to date. 4.3. Ensure that the information obtained is appropriate to enable you to advise the client. 4.4. Analyse the information received from the client and the research process and formulate options that could meet client needs. 4.5. Perform work within agreed organisational procedures and time limits for researching information.

### Assessment Guidance

The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:

Assessment Method	Definition	Possible Content
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests

Title	Consumer Law	
Level	Three	
Credit Value	1	
Guided Learning Hours (GLH)	6	
OCN NI Unit Code	CAZ790	
Unit Reference No	M/506/2755	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to advise on consumer law.		
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
1. Understand the Law of Contract.	1.1. Explain the common elements of contract law as it applies in your country. 1.2. Explain the relevant statutory rights and associated remedies in relation to consumer and contract legislation as they apply in your country.	
2. Understand the relevant legislation with respect to the supply and sale of goods.	2.1. Explain the relevant legislation with respect to the supply and sale of goods. 2.2. Clarify criminal issues and discrimination within the provision of goods, services and credit as they apply in your country. 2.3. Explain the role of relevant consumer organisations and agencies in your country. 2.4. Explain how to recognise and challenge unfair conditions.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests

Title	Disability Benefits	
Level	Three	
Credit Value	3	
Guided Learning Hours (GLH)	21	
OCN NI Unit Code	CAZ791	
Unit Reference No	T/506/2756	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to advise on disability benefits.		
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
1. Understand the main disability benefits available.	1.1. Explain the definition of disability as it is defined in the Disability Discrimination Act and explain the implications of the definition for combatting disability discrimination. 1.2. Summarise the main disability benefits. 1.3. Explain the procedures for challenges and appeals with reference to disability benefits. 1.4. Explain the basic principles of the appeal system relating to disability benefits.	
2. Understand the conditions of entitlement.	2.1. Explain the rules qualifying conditions for claiming disability benefits. 2.2. Explain the assessment procedure for each benefit.	
3. Know how to calculate disability benefits.	3.1. Explain the appropriate rates for each benefit. 3.2. Calculate entitlement under differing circumstances and at different stages of claim.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests

Title	Employment Law	
Level	Three	
Credit Value	1	
Guided Learning Hours (GLH)	6	
OCN NI Unit Code	CAZ792	
Unit Reference No	A/506/2757	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to advise on employment law and related issues.		
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
1. Understand the different categories of employment status.	1.1. Explain the different categories of employment status and where to find the detail of the tests to determine this. 1.2. Summarise and evaluate the main statutory rights determined by employment status and the specific rights protecting different clients or client groups. 1.3. Critically compare the difference between statutory and contractual rights in employment and describe the sources of evidence for contractual terms.	
2. Understand the framework of legislation relating to discrimination in employment.	2.1. Explain the framework of legislation relating to discrimination in employment in terms of eligibility and scope. 2.2. Explain where to find the detail of the tests for discrimination in employment. 2.3. Explain the different forms of employment proceedings, their jurisdictions and time limits covered by the legislative framework in your country. 2.4. Critically compare the potential outcomes from possible options for redress.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log

Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests



Title	Advisor Immigration and Nationality	
Level	Three	
Credit Value	2	
Guided Learning Hours (GLH)	13	
OCN NI Unit Code	CAZ789	
Unit Reference No	F/506/2758	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to advise on immigration related issues.		
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
1. Understand the background government policy relating to immigration and legislation.	1.1. Explain the background of immigration policy and legislation in general terms. 1.2. Summarise the legislative framework and statutory basis of the immigration rules. 1.3. Assess when to signpost or refer clients to additional or alternative sources of support or advice.	
2. Understand the relevant rules and rights of European nationals.	2.1. Explain the relevant regulations and directives of the European Union (EU) and the European Economic Area (EEA). 2.2. Explain in general terms how the European Convention on Human Rights (ECHR) and human rights legislation impacts on immigration and nationality.	
3. Know the rights and entitlement to public funding and services available to different categories of immigrants.	3.1. Identify clients' rights to public funding appropriate to their circumstances. 3.2. Explain the entitlement to public services in relation to client status and demonstrate how to access them. 3.3. Clarify the potential adverse impact of providing incomplete advice. 3.4. Explain good practice relating to the use of interpreters and how to source them.	
4. Be able to identify how and where to signpost/refer clients for additional advice.	4.1. Summarise the options for signposting and referral. 4.2. Critically analyse when and how to refer/signpost. 4.3. Analyse own performance.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log

Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests

Title	Interview Skills
Level	Three
Credit Value	2
Guided Learning Hours (GLH)	13
OCN NI Unit Code	CAZ793
Unit Reference No	J/506/2759
<i>Unit purpose and aim(s):</i> This unit will enable the learner to understand how to record advice interviews.	
Learning Outcomes	Assessment Criteria
1. Know how to establish communication with clients.	1.1. Summarise for clients the service available to them. 1.2. Summarise the organisational policy on confidentiality and communicate this to clients. 1.3. Explain how to take appropriate action to minimise the effect of any difficulties with communication. 1.4. Demonstrate the provision of first line information to clients using telephone. 1.5. Analyse situations where immediate action is required to assist clients and take appropriate action.
2. Evaluate own practice.	2.1. Collate valid and reliable evidence to enable the assessment of own work, which includes an assessment of the effects of own behaviour and values on others. 2.2. Assess the validity and importance of critical feedback on performance and evaluating own practice. 2.3. Analyse own performance.
3. Know how to enable clients to explore their problems and concerns.	3.1. Create an atmosphere and environment in which clients feel comfortable enough to express their concerns and problems. 3.2. Explain how to provide clients with opportunities to explore their issues. 3.3. Analyse the issues raised by clients to establish their nature and a scope.
4. Know how to manage the interview process.	4.1. Persuade clients to provide additional information on their situation or needs. 4.2. Respond according to the guidelines and procedures of the organisation. 4.3. Explain the organisation's systems and procedures for working with the client. 4.4. Comply with relevant legislation, codes of practice guidelines and ethical requirements.
5. Know how to bring interviews to an end.	5.1. Explain to clients that their decisions will be respected after the interview. 5.2. Summarise the discussions and outcomes achieved or agreed and check client's understanding. 5.3. Clarify opportunities for providing further support for clients. 5.4. Summarise the interview outcomes and agreed actions in the appropriate systems.

6. Support clients to identify options to meet their needs.	6.1. Explain to clients those needs that cannot be met and signpost or refer them to additional or alternative sources of support or advice. 6.2. Summarise options for achieving clients' needs and encourage the clients' involvement in the process where possible.
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### Assessment Guidance

The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:

Assessment Method	Definition	Possible Content
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests

Title	Money Advice	
Level	Three	
Credit Value	1	
Guided Learning Hours (GLH)	6	
OCN NI Unit Code	CAZ794	
Unit Reference No	A/506/2760	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to provide advice on money matters.		
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
1. Understand the various causes and reasons for debt.	1.1. Summarise the various causes and reasons for debt accumulation. 1.2. Explain how to establish the nature and extent of debt in individual circumstances and why this is important.	
2. Understand the impact of debt on individuals.	2.1. Explain how to gather information from the client to establish their current levels of income and expenditure and explain why this is important. 2.2. Explain the key components of a financial statement of income and expenditure and explain how to prepare a statement. 2.3. Explain how to prioritise debt in individual circumstances and why this is important. 2.4. Critically compare different payment methods in relation to debt.	
3. Understand the options that clients may take when dealing with debt problems.	3.1. Summarise the Money Advice process. 3.2. Explain what could constitute an emergency situation in relation to debt and money advice and explain the appropriate action to take in relation to client need. 3.3. Summarise the key ways in which clients can maximise their income and why it is important to do this. 3.4. Identify and describe a variety of options that clients may take when dealing with debt problems. 3.5. Clarify and agree needs that cannot be met and signpost or refer clients to additional or alternative sources of support or advice.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion

Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests

Title	Welfare Benefits	
Level	Three	
Credit Value	6	
Guided Learning Hours (GLH)	42	
OCN NI Unit Code	CAZ795	
Unit Reference No	F/506/2761	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to understand and apply criteria relating to welfare benefits.		
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
1. Understand first line welfare benefits.	1.1. Explain the legislative framework in your country relating to welfare benefits. 1.2. Explain the current structure of the welfare benefits system and the nature of the key agencies involved in the administration of benefits at a local and national level. 1.3. Explain means tested contributory and non-contributory benefits. 1.4. Critically compare the differences, relationship and interaction between different types of benefits.	
2. Know how to apply first line welfare benefits to client circumstances.	2.1. Explain how to identify the eligibility criteria for all benefits relevant to specific client groups and explain how entitlement may be affected by individual circumstances. 2.2. Explain appropriate options for maximising benefit income. 2.3. Explain the legal position and what action should be taken in cases of benefit overpayment or fraud. 2.4. Explain the relationship between housing and entitlement to other benefits.	
3. Know how to calculate first line welfare benefits.	3.1. Calculate benefit entitlement and make benefit claims for clients in at least three different circumstances. 3.2. Describe the impact of one type of benefit on other benefits. 3.3. Assess the impact of one type of benefit on other benefits.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes/written work Learner log/diary Peer notes Record of observation Record of discussion

Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Record of observation Learner notes/written work Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Record of observation Learner notes/written work Tutor notes/record Learner log/diary
E-assessment	The use of information technology to assess learners' work	Electronic portfolio E-tests



Title:	Understanding Personal Independence Payments	
Level:	Three	
Credit Value:	1	
Guided Learning Hours (GLH):	6	
OCN NI Unit Code:	CAZ367	
Unit Reference No:	J/506/2762	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to demonstrate a knowledge and understanding of Personal Independence Payments.		
<b>Learning Outcomes</b>		<b>Assessment Criteria</b>
1. Know the rules and qualifying criteria for making a Personal Independence Payment claim.	1.1. Explain the rules and qualifying criteria for making a Personal Independence Payment claim. 1.2. Explain the circumstances where clients are exempt from key eligibility conditions.	
2. Understand the Disability tests for Personal Independence Payment.	2.1. Explain assessment procedures for Personal Independence Payment. 2.2. Demonstrate completion of a Personal Independence payment form.	
3. Know Personal Independence Payment rates and components.	3.1. Explain the selection of appropriate rates for each benefit based on client circumstances. 3.2. Demonstrate entitlement calculation.	
4. Know the Personal Independence Payment application procedure.	4.1. Explain application procedure. 4.2. Summarise what support is available to assist clients with the application process.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes Learner log/diary Peer notes Record of observation Record of discussion Audio/video/photographic record Charts/graphs
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Tutor record of observation Learner notes Tutor lesson plan Tutorial notes Audio/video/photographic record Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Tutor record of observation Learner notes Tutor lesson plan Tutorial notes Audio/video/photographic record Learner log/diary

Title:	Understanding Universal Credit	
Level:	Three	
Credit Value:	2	
Guided Learning Hours (GLH):	13	
OCN NI Unit Code:	CAZ366	
Unit Reference No:	L/506/2763	
<i>Unit purpose and aim(s):</i> This unit will enable the learner to demonstrate a knowledge and understanding of the rules and qualifying criteria associated with Universal Credit.		
<b>Learning Outcomes</b>		
<b>Assessment Criteria</b>		
1. Know the rules and qualifying criteria for making a Universal Credit claim.	1.1. Explain the rules and qualifying criteria for making a Universal Credit claim. 1.2. Explain when clients are exempt from key eligibility conditions. 1.3. Explain what is meant by the term transitional protection.	
2. Understand how to calculate Universal Credit.	2.1. Explain the component parts of a Universal Credit calculation. 2.2. Demonstrate manual and electronic entitlements calculations. 2.3. Summarise what is meant by the benefit cap.	
3. Know the procedure to claim Universal Credit.	3.1. Explain application procedure. 3.2. Summarise the support available to assist clients with the application process.	
<b>Assessment Guidance</b>		
The following assessment method/s may be used to ensure all learning outcomes and assessment criteria are fully covered:		
<b>Assessment Method</b>	<b>Definition</b>	<b>Possible Content</b>
Portfolio of evidence	A collection of documents containing work undertaken to be assessed as evidence to meet required skills outcomes OR A collection of documents containing work that shows the learner's progression through the course	Learner notes Learner log/diary Peer notes Record of observation Record of discussion Audio/video/photographic record Charts/graphs
Practical demonstration/assignment	A practical demonstration of a skill/situation selected by the tutor or by learners, to enable learners to practise and apply skills and knowledge	Tutor record of observation Learner notes Tutor lesson plan Tutorial notes Audio/video/photographic record Learner log
Coursework	Research or projects that count towards a learner's final outcome and demonstrate the skills and/or knowledge gained throughout the course	Tutor record of observation Learner notes Tutor lesson plan Tutorial notes Audio/video/photographic record Learner log/diary

## Quality Assurance of Centre Performance

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### External Verification

All OCN NI recognised centres are subject to External Verification. External verification visits and monitoring activities will be conducted annually to confirm continued compliance with the conditions of recognition, review the centre's risk rating for the qualification and to assure OCN NI of the maintenance of the integrity of the qualification.

The External Verifier will review the delivery and assessment of this qualification. This will include the review of a sample of assessment evidence and evidence of the internal verification of assessment and assessment decisions. This will form the basis of the EV report and will inform OCN NI's annual assessment of centre compliance and risk. The External Verifier is appointed by OCN NI.

### Standardisation

As a process, standardisation is designed to ensure consistency and promote good practice in understanding and application of standards. Standardisation events:

- make qualified statements about the level of consistency in assessment across centres delivering a qualification
- make statements on the standard of evidence that is required to meet the assessment criteria for units in a qualification
- make recommendations on assessment practice
- produce advice and guidance for the assessment of units
- identify good practice in assessment and internal verification

Centres offering units of an OCN NI qualification must attend and contribute assessment materials and learner evidence for standardisation events if requested.

OCN NI will notify centres of the nature of sample evidence required for standardisation events (this will include assessment materials, learner evidence and relevant assessor and internal verifier documentation). OCN NI will make standardisation summary reports available and correspond directly with centres regarding event outcomes.

## **Administration**

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### **Registration**

A centre must register learners within 20 working days of commencement of this qualification.

### **Certification**

Certificates will be issued to centres within 20 working days of receipt of correctly completed results marksheets. It is the responsibility of the centre to ensure that certificates received from OCN NI are held securely and distributed to learners promptly and securely.

### **Charges**

OCN NI publishes all up to date qualification fees in its Fees and Invoicing Policy document. Further information can be found on the centre login area of the OCN NI website.

### **Equality, Fairness and Inclusion**

OCN NI has considered the requirements of equalities legislation in developing the specification for this qualification.

For further information and guidance relating to access to fair assessment and the OCN NI Reasonable Adjustments and Special Considerations policies, centres should refer to the OCN NI website.

## **OCN NI Level 3 Certificate in Generalist Advice**

**Qualification Number: 601/3234/6**

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Operational start date: 01 June 2014  
Operational end date: 31 December 2025  
Certification end date: 31 December 2028

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