

Student Name: _____

Workplace mentor name	Workplace	
I am a qualified financial counsellor and fulfil ASIC requirements to be a member of the peak body in my State/ Territory.	yes	no

Do you have first-hand knowledge or experience of the student and their work in financial counselling? Yes No

Do you understand which evidence/tasks the student has provided/performed that you are required to comment on? Yes No

Are you willing to be contacted should further verification of this report be required? Yes No

Are you aware that the student will see a copy of this form? Yes No

Please tick (✓) in the column (yes or no) next to each of the following statements and comment as appropriate.

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
CHCCSL001 Establish and confirm the counselling relationship					
1.1 Analyse existing client information prior to commencement of counselling session					
1.2 Use initial session to gather additional client information as a foundation for counselling process					
1.3 Select and use communication techniques that support the initial counselling session objectives					
1.4 Follow a structured approach to counselling based on client needs and expectations					
2.1 Provide information that assists clients to understand the nature of the counselling service on offer					
2.2 Clarify, confirm or modify client expectations of the counselling service					
2.3 Identify client anxieties about the counselling process and explore with clients					
2.4 Acknowledge and show respect for client's immediate concerns					
2.5 Clarify both expectations and commitment to the counselling relationship and confirm with clients					
2.6 Identify indicators of client issues beyond scope of own role and report or refer according to presenting issue and organisation requirements					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
3.1 Explore options and approaches for the relationship with clients according to individual need					
3.2 Agree priorities and develop a plan for counselling in collaboration with the client					
3.3 Make documented agreement with the client that addresses disclosure and organisation requirements					
CHCCSL002 Apply specialist interpersonal and counselling interview skills					
1.1 Identify communication barriers and use strategies to overcome these barriers in the client-counsellor relationship					
1.2 Facilitate the client-counsellor relationship through selection and use of micro skills					
1.3 Integrate the principles of effective communication into work practices					
1.4 Observe and respond to non-verbal communication cues					
1.5 Consider and respond to the impacts of different communication techniques on the client-counsellor relationship in the context of individual clients					
1.6 Integrate case note taking with minimum distraction					
2.1 Select and use communication skills according to the sequence of a counselling interview					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
2.2 Identify points at which specialised counselling interviewing skills are appropriate for inclusion					
2.3 Use specialised counselling communication techniques based on their impacts and potential to enhance client development and growth					
2.4 Identify and respond appropriately to strong client emotional reactions					
3.1 Reflect on and evaluate own communication with clients					
3.2 Recognise the effect of own values and beliefs on communication with clients					
3.3 Identify and respond to the need for development of own skills and knowledge					
CHCCSL003 Facilitate the counselling relationship and process					
1.1 Follow the client's story and stay with their perspective to assist the client to feel comfortable and express their concerns freely					
1.2 Explore the client's presenting issues and establish their nature and depth, giving attention to the possibility of underlying issues					
1.3 Identify and promptly deal with situations requiring immediate action					
1.4 Support clients to identify their primary concerns in relation to the presenting issues and to prioritise concerns on which to work					
1.5 Recognise indicators of client issues requiring referral and report or refer appropriately in line with organisation requirements					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
2.1 Identify and work with uncertainty and ambivalence of clients					
2.2 Support clients to experience and process difficulties					
2.3 Draw attention to, and discuss parallels and links in client's experience as appropriate					
2.4 Identify and implement interventions that have meaning for the client's immediate situation and that are most likely to facilitate client understanding and actions					
2.5 Support client to identify and use known and previously unknown strengths					
2.6 Explore perceptions of client's feelings by reflecting back, clarification and review					
2.7 Assist clients to become aware of underlying issues where appropriate and begin to identify ways of dealing with them					
2.8 Acknowledge and work with changes in client's life as appropriate					
3.1 Monitor and review the counselling process with clients to ensure it remains of value					
3.2 Proactively identify and work on threats and disruptions to the counselling process with clients					
3.3 Review and compare own and client's perceptions of the process and provide suggestions and advice in response					
3.4 Address any tension between client's hopes and expectations and the reality of resource limitations					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
3.5 Facilitate change at a pace the client can tolerate and assimilate					
3.6 Recognise and assess the appropriateness of ending the current counselling					
3.7 Acknowledge, value and work with individual uncertainty in the counselling relationship					
3.8 Apply ethical codes of conduct in addressing counselling dilemmas					
4.1 Enable client to identify when the process is approaching its conclusion					
4.2 Enable client to identify, acknowledge and evaluate what is and is not changing, both in the counselling process and in their situation and understanding					
4.3 Use the ending process to enable client to understand the nature and impact of earlier issues					
4.4 Use boundaries of the counselling relationship to assist the ending process					
4.5 Plan, structure and contract endings appropriately with client					
4.6 Support client's sense of autonomy during the ending process					
4.7 Inform clients about any opportunities for further support					
4.8 Identify unresolved issues and discuss further work if appropriate					
CHCCSL007 Support counselling clients in decision-making processes					
1.1 Explain clearly to clients the policy on record-keeping and confidentiality					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
1.2 Encourage clients to identify and explore their aims, requirements and ideas					
1.3 Assist clients to identify practical goals and requirements for these, and discuss with clients how goals might be modified based on client strengths					
1.4 Identify situations where aims and requirements of clients cannot be met, and make referrals to alternative sources of guidance and support					
2.1 Identify collaboratively potential courses of action for meeting individual aims and requirements					
2.2 Identify and explore factors which could influence the preference for, and ability to achieve, a course of action					
2.3 Determine and explore features and likely consequences of possible courses of action					
2.4 Check client's understanding of what is likely to be involved in each possible course of action					
3.1 Assist clients to assess possible advantages and disadvantages of each possible course of action, and their appropriateness for meeting client requirements					
3.2 Encourage clients to decide on a course of action and to consider alternatives which could be used, if necessary					
3.3 Document decisions and agreed ongoing support within organisation guidelines					
CHCFIN001 Facilitate the financial counselling process					
1.1 Obtain informed consent from client to enter into a financial counselling process					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
1.2 Identify and address any conflicts of interest and/or other ethical considerations					
1.3 Identify appropriateness of financial counselling on the basis of routine client information collected and analysed					
1.4 Clarify with client the role of financial counsellor and expectations of the representative agency					
1.5 Explain rights and responsibilities of client and counsellor in the financial counselling process					
1.6 Clarify client expectations and needs to ensure their issues and motivations are suited to financial counselling					
1.7 Make an appropriate referral with client consent if client need is identified as outside scope of own work role					
1.8 Explain confidentiality policy of the representative agency					
2.1 Collect information on client's financial and extended situation including relevant personal issues that may impact on this situation					
2.2 Examine and analyse the material with client to identify areas for further investigation					
2.3 Seek additional information as required, including the status and validity of contracts					
2.4 Highlight important features of the client's financial position					
2.5 Assist client to identify areas where they want to take action					
2.6 Identify and discuss client's legal rights and responsibilities					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
2.7 Make technically sound and substantiated assessment of client issues					
3.1 Work with the client to establish a list of concerns					
3.2 Proactively identify areas for possible action and prioritise to reflect client's concerns					
3.3 Provide information regarding client responsibilities and rights in relation to individual debts and overall financial situation					
3.4 Discuss with client, options and potential consequences					
4.1 Work with the client to prioritise areas for action immediately and in the longer term					
4.2 Assist client to identify workable strategies to address their financial concerns					
4.3 Assist client to develop their own action plan to address their circumstances					
4.4 Discuss need for advocacy or negotiation by client and/or financial counsellor					
4.5 Write and maintain a client service plan which identifies the assessed issues, the client and financial counsellor strategies and responsibilities					
5.1 Identify areas for ongoing support and opportunities for specialist referral to other agencies or professionals					
5.2 Identify range of support services able to be provided by the organisation and others					
5.3 Work through with the client, the roles and responsibilities of client and counsellor in the support framework					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
5.4 Implement processes to evaluate effectiveness of support provided to the client by the financial counsellor					
5.5 Revise support services in the light of evaluation feedback					
CHCFIN002 Identify and apply technical information to assist clients with financial issues					
1.1 Source and review available information about client income					
1.2 Identify potential income sources and entitlements for client					
1.3 Identify and inform client of potential for additional or different income sources or entitlements to improve their financial situation					
2.1 Assist the client to review and document their approach to managing living expenses					
2.2 Identify client's options and rights for managing living expenses					
2.3 Provide additional information to address gaps in client knowledge about living expenses and available support					
3.1 Clarify client's understanding of their rights regarding legal and consumer protection					
3.2 Discuss identified legal and consumer protection issues to highlight key areas that may require action					
3.3 Provide additional information to address gaps in client knowledge about their rights in relevant legal and consumer protection areas					
3.4 Identify and provide appropriate opportunities for referral where required					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
4.1 Review contracts and associated documentation to clarify validity of client debt					
4.2 Review areas of client debt and seek further information to clarify types of debt and the stage of the debt					
4.3 Provide information to assist client to understand the implications of different types of debt that may be impacting on them					
5.1 Identify impact of debt and debt recovery processes on client and their financial situation					
5.2 Review a range of options relevant to debt and debt recovery and identify potential consequences in relation to the client and their financial situation					
5.3 Identify appropriate strategies for debt management to address client's particular situation					
6.1 Proactively identify and assess type of support services needed by client based on analysis of financial information					
6.2 Provide current and accurate information about, and refer client to, services to address client needs					
CHCFIN003 Develop and use financial counselling tools and techniques					
1.1 Review and use client information to inform preparation of a statement of assets and liabilities for the client					
1.2 Work with the client to prepare a statement of income and expenditure in line with their immediate and ongoing financial situation					
1.3 Identify and clarify for the client the different elements of their financial position					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
2.1 Develop written tools for use in advocacy and negotiation according to organisation protocol					
2.2 Identify and source existing standardised resources for use in advocacy					
2.3 Apply appropriate negotiation tools and techniques to advocate and negotiate on behalf of client					
2.4 Undertake telephone and face-to-face negotiations as required to meet and/or improve client's financial position					
2.5 Obtain third party authority to act on behalf of client in appropriate format					
2.6 Collect and use appropriate documentation to support the advocacy process					
3.1 Use standard checklists to develop and review resource materials that contain relevant and current information					
3.2 Maintain currency and completeness of available resources					
3.3 Prepare resources as a basis for addressing duty of care requirements when undertaking financial counselling with clients					
3.4 Provide client with relevant, clear and targeted resource materials to inform and assist the client to improve their financial position					
3.5 Undertake research as a basis for preparing an information package on client issues for their later reference					
3.6 Ensure written materials are written in a succinct and clear way and are presented logically and					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
sequentially to match third party needs with client objectives					
3.7 Ensure all written documentation produced addresses financial counselling sector standards and practices					
CHCLEG002 Interpret and use legal information					
1.1 Identify legislation that applies to the situation based on client or broader work needs					
1.2 Investigate the scope and coverage of the legislation and its relevance to the situation					
1.3 Correctly interpret terms and definitions in the legislation					
1.4 Seek assistance or clarification from relevant personnel or experts					
2.1 Research legislation and its provisions that apply to the situation					
2.2 Correctly interpret the detail of provisions within scope of own role					
2.3 Extract and distil information relevant to the situation					
2.4 Clearly and accurately document information					
3.1 Summarise and present relevant legal information in a way that is suited to the client or other audience					
3.2 Analyse how legal provisions directly link to the situation					
3.3 Identify and respond to challenges presented by the situation and associated legal information					

In working with clients does the student display the following skills?	Yes	No	Comment	Initials	Date
3.4 Clearly communicate options for action and possible outcomes					
3.5 Identify situations where referral to legal experts is required and take action accordingly					
3.6 Take action that supports achievement of the best possible outcome					
4.1 Identify and use opportunities to maintain knowledge of current and emerging legal information					
4.2 Share updated knowledge and information with peers and colleagues					
4.3 Pro-actively engage in process of review and improvement					
CHCCCS019 Recognise and respond to crisis situations					
1.1 Recognise and respond to signs indicating that there may be safety issues for people					
1.2 Consider indicators from direct and indirect communications that suggest the presence of safety issues					
1.3 Ask directly about safety issues whenever there are grounds for concern, and take immediate action based on organisation's procedures					
4.1 Recognise and minimise risks to self, associated with crisis support					
4.2 Identify and respond to the need for supervision and debriefing					

	NAME	SIGNATURE	DATE
I confirm that I have observed all tasks ticked and initialed by me and the student is competent in those tasks.			
I confirm that I have observed all tasks ticked and initialed by me and the student is competent in those tasks.			