# STEP-BY-STEP GUIDE TO OISC REGISTRATION



This is just a guide.... so don't worry if you're not precisely following all of the steps



### Become a FIAP partner

(4) Allow up to 3 weeks

# □ Fill in the Become a Partner form

We'll send you some information to read.

#### ☐ Have 'Partner Fit' call with FIAP. We'll explore:

- -Could you refer instead?
- -What's your funding situation?
- -Are your board on board?
- -Are you clear on different advice types?

# □ Chat to stakeholders, especially trustees Share the info from the Partner Fit call. Is everyone still on board?

#### Consider your clients

Read the OISC Guidance on Competence. What kind of OISC advice would best support your clients?

#### □ Talk to your manager

Student

Student

Keep them informed as your ideas develop.

Manager

Manager

🖊 Congratulations!

You are a FIAP partner

"My advice for others: take your time, talk to OISC, talk to Refugee Action." Indre, Samphire



## Get your stuff together

(4) Allow up to 2 months (The quickest we've seen this done is 2 weeks)

#### Reassess beneficiary needs

#### □ Draw up an advice model

Decide on the scope of the advice to be offered and how this will integrate into your services.

#### □ Identify prospective advisers Explain what they need to do.

□ Consult CEOs and trustees Pitch why OISC advice is needed.

□ Read the <u>Guidance on Competence</u>

#### □ Refer to Guidance on **Competence**

To understand the work you will be trained to carry out.

# □ Check the <u>OISC exam dates</u>

Loosely earmark one to aim for.

#### □ Read the relevant Competence **Statement**

New Adviser or Adviser Raising. It will need to be submitted with your org's OISC application.

> "OISC are more flexible than they appear from their website."

Shantele, CHAWREC







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Page 2 (of 2)

# Step 2

# **Booking up**

(4) Allow up to 3 months (The quickest we've seen this done is 3 weeks)

Manager

Ensure your org can commit to the <u>Codes of</u>
 Standards

Get a quote for professional indemnity insurance.

- □ Get a quote for professional indemnity insurance
- Identify funding source for the work to be done
- ☐ Ensure students book onto courses

- □ Book the right course
- Access online learning materials for self-study
- Get a recent DBS and proof of right to work
- Complete application and give to organisational lead for submission to OISC

"The session with the FIAP team was brilliant.

It dispelled our fear very effectively."

Fidelis, Migrant Action

#### Step 3

# The final push

(4) Allow up to 3 months (The quickest we've seen this done is 3 weeks)

Manager

- Complete <u>Application for Registration</u>
   Ensure your advisers' DBS checks will be less
  - than 6 months old.

    Obtain signatures of all owners (CEOs and
- Obtain signatures of all owners (CEOs and trustees) and advisers
- Prepare <u>supporting document</u>

  Complaints procedure busines
  - Complaints procedure, business plan, client care letter, closer letter templates etc.
- Obtain Competence Statements from advisers
- Submit all applications to OISC Submit your application no more than 5 weeks in advance of the exam your advisers want to attend.

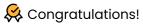
- □ Attend the right course
- □ Study/revise

Student

- Complete <u>New Adviser</u>
   <u>Application and Competence</u>

   <u>Statement</u> or <u>Adviser Raising</u>
   <u>Levels Competence Statement</u>
- ☐ Get proof of right to work
- Complete application and give to organisational lead for submission to OISC

Submit to Manager/OISC registration lead.



You are OISC registered

Julie, from FIAP, is helping me prepare a business plan. With her support, it is much easier."

Ake, Migrants at Work



