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**Overview**

This standard is about helping clients to access referral opportunities. It is aimed at people who provide advice and guidance to clients who use services such as public services, education and training, health services and those provided by welfare professionals and others.

The standard looks at identifying options for referrals for clients and enabling them to access the referral opportunities available.

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**Performance  
criteria**

- You must be able to:
- 1 request information from clients on their requirements in ways that meet their needs
  - 2 obtain information on services that are potentially suitable in line with the needs of clients
  - 3 assess the suitability of services for meeting clients' requirements in line with organisational requirements
  - 4 confirm acceptance criteria and referral procedures of services
  - 5 check services have capacity and resources to deal with additional clients
  - 6 review requirements of clients and check against acceptance criteria and referral procedures of other services
  - 7 review referral options with clients whilst discussing the advantages and disadvantages for clients in line with their needs
  - 8 provide additional support if required by clients in line with their needs
  - 9 plan effective implementation of referrals with clients and facilitate contact with relevant services
  - 10 explain to clients how confidentiality is maintained when information is exchanged between services
  - 11 check that referral procedures are completed
  - 12 comply with all relevant legal, professional and organisational requirements and guidelines in relation to enabling clients to access referral opportunities
  - 13 record details of referrals in line with organisational requirements

## Knowledge and understanding

### You need to know and understand:

- 1 the importance of complying with relevant legal, professional and organisational requirements and guidelines
- 2 legislation, codes of practice, organisational policies and procedures in relation to job role/activities undertaken
- 3 range of services available and how to obtain information on services
- 4 what information should be obtained
- 5 different methods of communication and how to adapt them to suit the needs and preferences of the clients
- 6 types of information that are useful and what requirements can be met by services
- 7 how to evaluate the suitability of services and additional information that should be obtained
- 8 alternative options for referrals
- 9 how to obtain information on acceptance criteria and how to match clients' requirements against acceptance criteria
- 10 procedures of different services for referrals
- 11 how to check the services' capacity and resources
- 12 level of detail clients require
- 13 why it is important to comply with different referral and acceptance criteria requirements and the implications for your organisation of not complying
- 14 how to obtain information on requirements
- 15 how to present referral opportunities in a positive manner
- 16 advantages and disadvantages of different options
- 17 information required for clients to make informed choices
- 18 how to check clients' views on referrals
- 19 objections clients might have to services and action to take if they do not agree with referrals
- 20 types of support or additional information clients need and who can provide it
- 21 time scales for different referral services
- 22 the responsibilities of services and clients
- 23 information to be transferred between services

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- 24 recording requirements of your organisation, including how to store recorded information securely

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