

## Liaise with other services

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### Overview

This standard is about liaising with other services. 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 establishing procedures for exchanging information with services, providing information to them and how to obtain information from services.

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### Performance criteria

You must be able to:

1. identify services available who you might exchange information with in line with organisational requirements
2. consult with services on their information requirements in line with organisational requirements
3. agree purpose, scope and procedures for exchanging information with services
4. identify roles and responsibilities for exchanging information
5. identify priorities of different services for exchanging information
6. disseminate procedures for exchanging information with services
7. review procedures for exchanging information
8. confirm information required by services
9. identify appropriate information in line with organisational requirements
10. assist services to access and interpret information they receive in line with organisational requirements
11. confirm with services that information provided is sufficient and appropriate for their needs
12. provide services with additional information in line with organisational requirements
13. determine methods to be used for obtaining information from services
14. access agreed information sources in line with organisational requirements
15. obtain information from services using specified methods
16. confirm the validity of information provided by services
17. protect information sources according to agreed procedures
18. identify problems with obtaining information
19. comply with all relevant legal, professional, and organisational requirements and guidelines in relation to liaising with other services
20. record information in line with organisational requirements

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## 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. services which might require information and the criteria to be used
4. culture and ethos of services
5. the range of services and support available
6. different methods of communication and how to adapt them to suit the needs and preferences of others
7. who should be informed of procedures
8. the importance of understanding the objectives of services
9. information required by different services
10. the importance of reaching agreement on types of information exchanged and who is involved in providing information
11. priorities of other services
12. how to disseminate different procedures from services
13. procedures to be reviewed and when to review them
14. how to obtain information on requirements and timescales for providing and exchanging information
15. how to match information to the requirements of services
16. where information is held
17. factors that affect interpretation of material
18. why it is important to check that services have received the information they require
19. which sources of information are available and how services can access it
20. types of information required from services
21. methods that can be used for obtaining information and difficulties that can occur when getting it
22. how to decide whether information is valid
23. why it is important to protect information sources
24. types of problems that could occur when exchanging information and action to take to address problems
25. why it is important to address problems and the implications of not addressing them
26. recording requirements of your organisation, including how to store recorded information securely

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