

## 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 community social welfare advice providers and others.

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

## Performance criteria

### *You must be able to:*

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

## Knowledge and understanding

### *You need to know and understand:*

1. legislation, codes of practice, organisational policies and procedures in relation to enabling clients to access referral opportunities
2. the importance of complying with relevant legal, professional and organisational policies, procedures and guidelines
3. range of services available and how to obtain information on services
4. different methods of communication and how to adapt them to suit the needs, preferences, and accessibility requirements of clients, ensuring inclusive practices.
5. types of information that are useful and what requirements can be met by services
6. how to evaluate the suitability of services and additional information that should be obtained
7. alternative options for referrals
8. how to obtain information on eligibility criteria and how to match clients' requirements against these criteria
9. procedures of different services for referrals
10. how to check the services' capacity and resources
11. why it is important to comply with different referral and eligibility criteria requirements and the implications for your organisation of not complying
12. how to obtain information on requirements of clients
13. how to present referral opportunities in a positive manner and outline the advantages and disadvantages of different options
14. information required for clients to make informed choices
15. how to check clients' views on referrals
16. objections clients might have to services and action to take if they do not agree with referrals
17. types of support or additional information clients need and who can provide it
18. time scales for different referral services
19. the responsibilities of services and clients
20. information to be transferred between services
21. organisational and legal recording requirements, including how to store recorded information securely
22. workplace requirements on equality, diversity and inclusion.
23. trauma informed principles and safeguarding requirements

Enable clients to access referral opportunities

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**Relevant Occupations** Education and Training, Health Professionals, Housing Advisors, Housing Officer, Public Service Professionals

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**Suite** Advice and Guidance

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