

**Unit Title:** Enable advice and guidance clients to access referral opportunities

OCR unit number 15

Unit sector reference AG13

Level: 3

Credit value: 3

Guided learning hours: 20

## Unit purpose and aim

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To show that the candidate understands the importance of other services and can assist clients to make use of these services if appropriate.

Learning Outcomes	Assessment Criteria
<p><b>The Learner will:</b></p> <p>1 Understand the process for referring clients to other organisations</p>	<p><b>The Learner can:</b></p> <p>1.1 Explain which organisations clients are likely to be referred to</p> <p>1.2 Explain what types of information the client will need including the various formats this may need to be in</p>
<p>2 Be able to identify options for referral</p>	<p>2.1 Obtain information from clients on their requirements</p> <p>2.2 Obtain relevant and current information on other services that are potentially suitable</p> <p>2.3 Assess the suitability of other services</p> <p>2.4 Confirm the other services' acceptance criteria and procedures</p> <p>2.5 Ensure the other services have the capacity and resources to deal with additional clients</p> <p>2.6 Review the requirements of the clients and check them against the services provided by the other services</p>

Learning Outcomes	Assessment Criteria
3 Be able to enable clients to take up referral opportunities	3.1 Provide information, including advantages and disadvantages of referral, to enable clients to make an informed decision 3.2 Confirm the acceptability of the referral with the client 3.3 Plan the implementation of the referral 3.4 Facilitate the client's contact with the other services 3.5 Review the boundaries of confidentiality with the client; informing them of the information that has to be passed between the services 3.6 Agree any further information or support that is required by the client

## Assessment

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This qualification is internally assessed by centre staff and externally verified by an OCR Assessor.

## Evidence requirements

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Simulation is not allowed for any part of this unit.

All evidence of your performance must be generated in your workplace, in accordance with organisational procedures and national, local and professional guidelines.

Prior to commencing this unit you should agree and complete an assessment plan with your assessor which details the assessment methods you will be using and the tasks you will be undertaking to demonstrate your competence.

You must provide your assessor with evidence for all of the assessment criteria for each learning outcome. Your assessor must be satisfied that you are able to undertake your work activities consistently over a period of time.

It is up to your assessor, working with the guidance provided, to determine a suitable mix of assessment methods, and to decide on the amount and type of evidence that is required to judge your competence.

The preferred assessment methods to be used for this unit are:

**Direct observation of performance:** Observation of you undertaking real work activities. This could involve interacting with clients or providing information to clients.

**Evaluation of work products:** Any item generated from real work activities. Evidence could be from different locations and from a variety of sources. This could include case notes, records and correspondence. It is not required in your portfolio and can remain where it is normally stored. The location and relevance of the evidence must be indicated in your portfolio. The evidence must be available for assessment and verification.

**Questioning:** Questions to ensure that you are able to apply your knowledge to your performance in the real work place. This may be used for areas not observed or evidenced through work products. This may be oral or written but evidence of the questioning must be recorded in an appropriate format. In addition your assessor may ask questions to clarify aspects of your practice.

**Witness testimony:** A confirmation or authentication of activities described in your evidence which your assessor has not seen. This could include a report or statement from a line manager or other appropriate person.

**Professional discussion:** A structured discussion with your assessor, about your performance of specific activities and a reflection on the reasons why you practised that way. The key aspects of this discussion will be recorded in a suitable format as evidence in your portfolio.

## National Occupational Standards (NOS) mapping/signposting

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This unit is derived from the National Occupational Standards in Advice and Guidance 2006 (Lifelong Learning UK).

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at [www.ukstandards.co.uk](http://www.ukstandards.co.uk).

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk) .