# Referrals and self-referral

CRPO's Standard 1.9: what to do before any referral, referring to someone you know, self-referral and its safeguards, no commissions, answering incoming referrals, and keeping your list current.

**Study aid, not legal advice.** Last verified against the official sources linked below on 11 November 2026.

## 1 Before any referral (1.9.1)

1. **Inform the client** of the referral, its reasons and implications.
2. Obtain their **informed consent** to refer.
3. Take reasonable steps to assure yourself of the other professional's **competence and character**: trained or certified, meeting their profession's standards, and what you say about them accurate.

## 2 When to refer

- You **must refer** when you lack the knowledge, skill or judgment to offer needed services, and supervision or consultation cannot make it safe (2.1.6).
- Other reasons: temporary unavailability, a **full client load**, or care that supplements yours.
- Whenever possible, give the names of **more than one** professional.

## 3 Someone you know (1.9.2)

- Fully disclose the **extent of the relationship**.
- Provide **alternatives**.
- Assure the client their decision will **not affect** your care.
- It is technically a conflict of interest; with these safeguards and a **document**ed conversation, it is not an irreconcilable one.

## 4 Self-referral (1.9.3)

- **Self-referral**: suggesting a client see you for another service (group therapy for an individual client) or elsewhere (an EAP client to your private practice).
- Allowed only if the **benefit to you** is disclosed.
- Offer **at least three** appropriate options, yourself included.
- Reassure the client the existing **relationship** will not be affected, and document the disclosure.

## 5 No commissions (1.9.4)

- Do not accept **commission fees** or otherwise benefit materially from referring clients to other professionals.

## 6 Incoming referrals (1.9.5)

- Respond within a **reasonable timeframe**, confirming or denying your capacity and competency to take the client.
- This includes people **acting on your behalf**, such as reception.
- If you decline, you are **not obligated** to suggest alternatives: the referring registrant makes reasonable efforts to find others.

## 7 Keep your list current

- ☐ Check from time to time that your referral contacts are **active** and taking new clients.
- ☐ Check they are in **good standing** with their college, if any.
- ☐ **Document** any disclosure about a referral or self-referral.

**Inform, get consent, check the professional; disclose any tie, offer three options for a self-referral, take no commission, and answer referrals promptly.**

Official sources: CRPO Standard 1.9, Referrals and CRPO Standard 2.1, Seeking Consultation, Clinical Supervision, & Referral. Condensed from Professional Conduct. Independent study aid, not legal advice, not affiliated with CRPO or COMPASS.