Referral Policy

PRN-111: Referral Policy
Company Name: AI Auto-Tech Ltd
Trading/Business Name: CAREHOPES
Company Registration Number: 15556946
SIC Code: 88100 – Social Work Activities Without Accommodation for the Elderly and Disabled
Email: admin@carehopes.com
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1. Introduction

TC values community engagement and encourages responsible referrals from individuals, families, organisations, affiliates, companions, volunteers, and group members. This Referral Policy outlines how referrals are made, processed, rewarded, and safeguarded within TC's operational framework.

Our referral system is designed to:

- promote ethical engagement
- expand access to companionship services
- reward responsible referrals
- empower companions and volunteers
- maintain professional boundaries
- protect TC's contractual integrity
- ensure safeguarding compliance

Official website: https://trustedcompanionship.com Official email: **admin@carehopes.com**

2. Purpose of the Policy

The purpose of this policy is to:

- define referral categories
- establish referral rules and boundaries
- outline eligibility for referral bonuses
- empower companions to refer ethically

- protect TC from unauthorised contract negotiation
- support safe onboarding of new clients
- maintain fairness and transparency

3. Who This Policy Applies To

This policy applies to:

- individual referrers
- family sponsors
- organisational sponsors
- companions and volunteers
- affiliates and group members
- community organisations
- TC staff and administrators

4. Referral Categories

TC recognises three types of referrals:

4.1. Standard Referrals

Referrals made by individuals who recommend TC to friends, family, or community members.

4.2. Organisational Referrals

Referrals made by care homes, councils, supported living providers, charities, or corporate partners.

4.3. Affiliate & Companion Referrals

Referrals made by approved affiliates, group members, companions, or volunteers who promote TC services under a structured referral programme.

5. Referral Principles

TC's referral system is guided by:

- ethical engagement
- safeguarding
- professional boundaries
- transparency

- accessibility
- fairness

6. Referral Process

6.1. How to Refer

Referrals must be submitted through:

- TC's official website: **https://trustedcompanionship.com**
- TC's official email: **admin@carehopes.com**
- TC's official phone line
- TC's digital referral form
- authorised organisational portals

6.2. Required Information

Referrers must provide:

- full name of referred person
- contact details
- location
- basic companionship needs
- sponsor details (if applicable)
- risk factors (if known)

6.3. TC Review

TC will:

- assess risk factors
- verify sponsor information
- confirm eligibility
- assign a companion (if approved)
- provide onboarding documentation

7. Referral Bonus Eligibility

Referral bonuses are available to:

- affiliates

- group members
- companions
- volunteers
- organisational partners (where contractually agreed)
- individuals who refer paying sponsors

7.1. Bonus Conditions

A referral bonus is awarded only when:

- the referred client signs a contract
- payment is received
- mobilisation occurs
- the client completes at least one session

Referral bonuses are **not** awarded for incomplete onboarding or cancelled contracts.

8. Organisational Referral Rules

Organisations may:

- refer multiple service users
- request priority onboarding
- replace service users under contract rules
- receive referral bonuses (if contractually agreed)

Organisations must provide accurate risk information and communicate through official TC channels.

9. Companion & Volunteer Referral Boundaries (Flexible & Empowering)

TC recognises that companions and volunteers are often the most visible representatives of the organisation. They interact with the public, engage socially, and naturally become ambassadors for TC's mission.

Therefore, companions and volunteers are **fully permitted** to:

- refer new clients
- share their referral code
- earn referral bonuses
- promote TC services socially

- create content advocating TC
- refer during field work or private time

Referral activity is considered **social engagement**, not contract negotiation, and does **not** constitute breach of organisational policy.

9.1. What Companions *Can* Do

Companions may:

- verbally share their referral code
- send their referral code digitally
- direct people to the TC website
- encourage people to explore TC's services
- advocate for TC on social media
- create awareness content
- refer clients anytime
- earn referral bonuses
- offer the public a **5% discount** via their referral code

9.2. What Companions *Cannot* Do

Companions must still avoid:

- discussing contract terms
- discussing fees, refunds, or pricing
- negotiating service conditions
- making promises on behalf of TC
- accepting direct booking requests
- providing personal contact details
- engaging in private communication outside TC channels

9.3. Approved Companion Referral Script (Updated)

If approached about TC services while with a client or during field work, companions must use the following approved script:

"I'm currently with a client now and I'm not allowed to spend time discussing details. Here is our website — https://trustedcompanionship.com — all the

information you need is there. You can also contact TC through the official channels on the website or at admin@carehopes.com. I'm not authorised to discuss referral or contract terms, but I *can* give you my referral code to check out with. If you use my referral code, you will receive a 5% discount on your total cost."

This script:

- protects professional boundaries
- avoids contract negotiation
- empowers companions to refer ethically
- supports TC's growth
- motivates staff and volunteers
- ensures the public receives accurate information

9.4. Why This Flexibility Matters

- Companions are TC's most visible ambassadors
- Many clients discover TC through companions in the field
- Referral activity strengthens community engagement
- Staff deserve the same referral opportunities as affiliates
- Allowing referral bonuses increases motivation and morale
- TC becomes a realistic, human-centred organisation
- It aligns with TC's social-care ethos and Agile mindset

10. Safeguarding Requirements

All referrals must comply with TC's safeguarding framework.

TC will:

- assess risk factors
- verify sponsor identity
- decline referrals that exceed operational capacity
- escalate concerns where necessary

11. Referral Limitations

TC may decline or delay referrals due to:

- companion availability

- environmental risks
- severe weather
- public safety concerns
- organisational changes
- relocation outside England and Wales
- safeguarding investigations

12. Fraud Prevention

TC monitors referrals for:

- false information
- duplicate submissions
- coercion
- manipulation
- unauthorised negotiation
- attempts to exploit referral bonuses

13. Complaints and Feedback

TC commits to:

- acknowledging complaints
- reviewing concerns within 10 working days
- documenting outcomes
- adjusting referral processes where necessary

14. Amendments to Referral Policy

TC may update this policy to reflect operational improvements, legal changes, new services, or governance decisions.