

Entry-level Diver Referrals

What is a “Referral?”

Referral is the process in which student divers complete part of their training in one location, such as a local dive center, and then complete the rest of their training at a different location with a different instructor, often to change a vacation into a dive adventure.

CONTENTS

- **Guidelines for the Referring Instructor**
- **Guidelines for the Receiving Instructor**
 - **PADI to PADI Referrals**
 - **NonPADI to PADI Referrals**
- **PADI Scuba Diver Upgrades**
- **“Universal” or “Global” Referrals FAQ**
- **General Referral FAQ**

Guidelines for the Referring Instructor

It's important to consider that the student diver you're referring knows very little about PADI Standards, training methods or procedures. The diver depends on you and the receiving instructor as the experts regarding the referral process. By following a few simple guidelines, you can help the diver feel comfortable with the process and confident that both you and the receiving instructor are working together to help meet the diver's goal of earning a PADI Open Water Diver certification.

Follow these steps:

1. Explain to the student diver that only successfully completed Knowledge Development sections, Confined Water Dives and Open Water Dives may be credited in a referral.
2. Keep the student diver's PADI Open Water Diver Course Record and Referral Form (10056) up-to-date. This form is located on the Student Record File (10058) or in the PADI Diver's Log and Training Record (70047). Be sure to mark completion of the Waterskills Assessment and Dive Flexible skills, as appropriate. Double check that there are no missing signatures, initials, dates, etc. before giving a copy to the diver. (*What if the referred diver is 10-11 years old? – See FAQ*)
3. Emphasize that the referral is only valid for a maximum of 12 months from the date of the last training session and that the balance of the course should be completed as soon as possible. (*What if 12 months pass? – See FAQ*)
4. Explain what to expect from the receiving instructor, such as – the instructor will:
 - Charge a fee for completing training, and there may be additional costs, such as equipment rental, boat fees, etc.
 - Assess your knowledge and skills to be sure you're ready to continue.
 - Need your PADI Open Water Diver Course Record and Referral Form and a copy of your signed medical form if you were required to get a physician's approval. (*What if the student diver is an eLearner? – See FAQ*)
 - Process your certification card after completing the last required open water dive with you, and after verifying that you've completed all other course requirements.
- Need a photo for your certification card (head and shoulders shot – no sunglasses, dark lenses or hats, and not underwater.) A digital photo may be acceptable – check with the instructor.
5. Emphasize that only a PADI Instructor may complete the open water dives for PADI certification. The diver can ask to see the instructor's certification card. Also, explain that it's possible to check with a PADI Regional Headquarters to verify whether an instructor is current and authorized to conduct PADI training.
6. If the student diver has decided on a destination to complete training, help the diver choose a PADI Dive Center or Resort based on relationships/knowledge of the destination or by using the Dive Shop Locator at padi.com.
 - If the student diver will fly to the destination, make sure the diver understands the most current Flying After Diving Recommendations
7. Help the student diver ensure everything will be prepared by contacting the selected dive center/resort to:
 - Verify that the dive operation accepts referred students, has a feasible dive schedule and a PADI Instructor available.
 - Ask about fees, equipment availability, digital or physical photo needed, and other concerns.
8. Provide your contact information and an invitation to contact you with questions.
9. Provide the student diver with your contact information.
10. Ask the student diver to contact you after certification. This will give you a chance to congratulate the diver and provide additional diving or training opportunities.

Guidelines for the Receiving Instructor

You may complete training for any entry-level student diver who has documentation (signed by the initial instructor) verifying which segments of training were successfully completed within the past 12 months. Two types of referrals apply: 1) referrals from other PADI Instructors ([PADI to PADI](#)) and 2) referrals in which the student diver started training with an instructor from another diver training organization ([NonPADI to PADI](#)).

There is also another type of referral, “[Universal](#)” or “[Global](#),” that is discussed in another section of this document.

PADI to PADI Referrals

Follow these steps:

1. Check the student diver’s PADI Open Water Diver Course Record and Referral Form (10056) to see which Knowledge Development sections, Confined Water Dives or Open Water Dives were completed, including which Dive Flexible Skills were successfully completed. Note that if the initial instructor conducted all five Knowledge Development sections or all five Confined Water Dives and the Waterskills Assessment, only one signature is necessary for each section on the form. ([What if the student diver is an eLearner? – See FAQ](#))
2. Before any inwater training, have the student diver complete:
 - Diver Medical form (10346). If the student diver was required to obtain a physician’s approval initially, the diver should provide a signed medical release with referral form. Note, however, that any new medical conditions will require a new medical release signed by a physician.
 - Standard Safe Diving Practices Statement of Understanding
 - PADI Release of Liability/Assumption of Risk/Nonagency Acknowledgment Form – General Training or PADI Statement of Risk and Liability/Nonagency Acknowledgment Form – General Training, EU Version. ([What if the referred diver is 10-11 years old? – See FAQ](#))
3. Assess that the student diver has adequate knowledge and skills to continue training. Remediate as necessary. Remember that you’re accepting responsibility for ensuring that the student is fully prepared to continue. For more information, refer to PADI’s *Guide to Teaching*, General Consideration, Assessing Knowledge Skills and Readiness.
4. Conduct the remaining segments of the PADI Open Water Diver course with the student diver. Double check that the diver successfully completed all Dive Flexible Skills.
5. If you complete the student diver’s final open water training dive, you certify the diver. You must process the diver’s certification card online (note that certification card processing is included for eLearners –[See FAQ](#)) or submit a PADI Positive Identification Card (PIC) envelope to your PADI Regional Headquarters for processing. ([How do I note who the referring PADI Member was? – See FAQ](#))
6. Retain the completed PADI Open Water Diver Course Record and Referral Form for your records.

For more information – refer to your PADI *Instructor Manual*, Open Water Diver Instructor Guide

Guidelines for the Receiving Instructor

NonPADI to PADI Referrals

Student divers who completed their initial training with another diver training organization may come to you to complete training. They may realize that a PADI certification card is widely recognized around the world and want their training to end with a PADI certification.

Follow these steps:

1. Review the referral document to verify that the student diver has completed the knowledge and skill development portions of an entry-level scuba course.
 - Make sure the training completion date listed on the referral document is not older than 12 months.
 - Check to see if the diver has completed a waterskills assessment (at least a 200 metre/yard swim or 300 metre/yard mask, snorkel and fin swim, and a 10 minute tread/float). If you can't verify completion, have the student diver complete the Waterskills Assessment.
 - Retain a copy of the referral form.
2. Before any inwater training, have the student diver complete:
 - Diver Medical form (10346). If a medical evaluation is indicated by the form, the diver must obtain a physician's approval unless the diver provides a current (within 12 months), signed medical release. Note, however, that any new medical conditions will require a new medical release signed by a physician.
 - Standard Safe Diving Practices Statement of Understanding
 - PADI Release of Liability/Assumption of Risk/Nonagency Acknowledgment Form – General Training or PADI Statement of Risk and Liability/Nonagency Acknowledgment Form – General Training, EU Version.
(What if the referred diver is 10-11 years old? – See FAQ)
3. Assess the diver's knowledge by administering one of the following, and remediate as necessary to verify mastery:
 - Open Water Diver Quick Review
 - ReActivate Quick Review
 - Open Water Diver Course final exam
4. Assess the diver's skills by conducting a confined water dive that reviews Open Water Diver course skills in preparation for open water training dives. Remediate as necessary.
5. Ensure that the student diver has a personal PADI *Open Water Diver eLearning/Manual* for use during the course and for reference afterward, unless unavailable in a language understood by the student diver. Ensure that the diver has a log book.
6. Conduct open water training dives with the student diver. Make sure the diver successfully completes all Dive Flexible Skills.
7. If you complete the student diver's final open water training dive, you certify the diver. You must process the diver's certification card online or submit a PADI Positive Identification Card (PIC) envelope to your PADI Regional Headquarters for processing.

For more information – refer to your PADI *Instructor Manual*, *Open Water Diver Instructor Guide*

PADI Scuba Diver Upgrade

PADI Scuba Divers may upgrade to PADI Open Water Divers any time after certification (no time limit) by following the Preassessment, Training and Certification steps.

Follow these steps:

1. Retain a photocopy of the diver's certification card.
2. Before any inwater training, have the diver complete:
 - Diver Medical form (10346). If a medical evaluation is indicated by the form, the diver must obtain a physician's approval unless the diver provides a current (within 12 months), signed medical release.
 - Standard Safe Diving Practices Statement of Understanding
 - PADI Release of Liability/Assumption of Risk/Nonagency Acknowledgment Form – General Training or PADI Statement of Risk and Liability/Nonagency Acknowledgment Form – General Training, EU Version
3. Assess that the diver has adequate knowledge and skills to continue training. Remediate as necessary. For more information, refer to PADI's *Guide to Teaching*, General Consideration, Assessing Knowledge Skills and Readiness.
4. Have the diver complete either a 200 metre/yard continuous surface swim or 300 metre/yard swim with mask, snorkel and fins.
5. Have the diver complete the balance of the Open Water Diver course:
 - Knowledge Development 4-5 including Quiz 4 and the Final Exam.
 - Confined Water Dives 4-5, and all remaining Dive Flexible Skills.
 - Open Water Dives 3-4, and all remaining Dive Flexible Skills.
6. If you complete the student diver's final open water training dive, you certify the diver as a PADI Open Water Diver. You must process the diver's certification card online or submit a PADI Positive Identification Card (PIC) envelope to your PADI Regional Headquarters for processing.

For more information – refer to your PADI *Instructor Manual*, PADI Scuba Diver Instructor Guide

“Universal” or “Global” Referrals FAQ

The PADI organization is not a proponent of “universal” or “global” referrals for several reasons. Some of these are described in detail below. Generally, legal advice is that it's difficult to defend this type of referral system because the certifying instructor does not see the student diver in the open water, and it can result (and has resulted) in customer service problems for the diver. However, if you choose to participate in this referral system, please make an informed choice.

How does the Universal referral process work?

A student diver presents a scuba instructor with a “universal” or “global” referral document. The student diver has taken initial training through another diver training organization. The instructions on the form direct the instructor to conduct open water dives as outlined on the form and sign a statement on the referral document verifying that the diver completed the dives. The student diver takes the form back to the original instructor who is supposed to certify the diver.

What's PADI's position on the Universal or Global referral approach, and why?

PADI's position on the Universal Referral program (and similar approaches) has also remained unchanged since the program was first presented to the RSTC in 1995. This position is based on recommendations from legal counsel regarding the difficulty (perhaps impossibility) of defending a lawsuit resulting from this referral process. Questions and issues that arise include:

- How can an instructor from one agency be familiar enough with the standards and training requirements of a different agency to defend how training was conducted?
- How can the referring (certifying) instructor ascertain that the person conducting the open water dives was even a current, qualified instructor at the time the training occurred?
- How can the certifying organization maintain any quality control whatsoever on the instructor conducting the open water training or have any reasonable way to know that its required open water skills were performed correctly by the student?

One of diving's most experienced attorneys, William Turbeville, as part of his analysis of the program for PADI, wrote this regarding the issue of an instructor authorizing certification for a diver whose open water training had been conducted by someone else: “It will be considerably more difficult to defend a claim of inadequate instruction if that instructor has never seen that student doing the single most important part of that student's training – actually scuba diving.”

If I refer my diver to complete training dives elsewhere, may I certify the person as a PADI Diver when the diver returns?

No. Under PADI Standards, only the instructor who conducts the final open water training dive of the course can certify the student diver. Issuing a PADI certification to anyone who you have not personally trained in an open water environment is a serious standards violation.

May I complete open water dives via the “universal” or “global” referral process and send the diver back to the originating instructor for certification?

Choosing to conduct a nonPADI program is completely up to you. These types of referrals are not within the scope of PADI Standards and programs. Therefore, whether or not you accept them is your business choice. It's recommended that you fully inform yourself before making such a decision by thoroughly researching the issue.

What problems have arisen from PADI Instructors accepting a Universal or Global referral?

Customer service issues have been a problem. Universal Referral students have had their open water dives conducted by a PADI Instructor, but the original instructor subsequently refused to issue their certifications resulting in very upset customers.

Accident issues are potentially far more serious. The “Universal Referral Manual” states that divers completing the open water dives receive a temporary card that is valid for 30 days. There have been cases where divers, after completing their Universal Referral open water training dives, went diving in the days following and suffered accidents. The core question is whether or not the divers were qualified divers prior to their original instructor issuing certification, and which party is responsible for the divers. The entire issue is complex and you should be aware of these possible legal complications.

Will insurance offered through Vicencia and Buckley cover me if I participate in Universal or Global referrals?

Yes, if you are the receiving instructor for a Universal or Global referral student and you do the open water training, you’re covered.

How can a student diver with a Universal or Global referral earn a PADI certification?

See [nonPADI to PADI Referrals](#) in this document.

General Referral Frequently Asked Questions (FAQs)

What if 12 months pass?

Referrals are only valid within 12 months of the last completed training segment. To extend the referral another 12 months, the original or another instructor at the original dive center/resort must complete one of the following with the student diver, based on the instructor's judgment on what would be most appropriate for the situation:

- A new course segment
- A previous course segment

By noting the completion date on the student diver's PADI Open Water Diver Course Record and Referral Form, the referral is valid for another 12 months.

What if the referred diver is under 18 years old?

Receiving Instructor – Before any inwater training, you must have a parent/guardian and the young, referred student diver sign the required administrative forms.

What if the referred diver is 10-11 years old?

Referring Instructor – If the referred student is 10 or 11 years old, send a copy of the Youth Diving: Responsibility and Risks Acknowledgement form (00602) that was completed and signed by a parent in addition to the referral document.

Receiving Instructor – If the referred student is 10 or 11 years old and does not provide you with a Youth Diving: Responsibility and Risks Acknowledgement form completed and signed by a parent, you must review the Youth Diving: Responsibility and Risks video or flip chart and complete the form with the parent and child.

What if the student diver is an eLearner?

Referring Instructor – Remember that certification card processing is included for a student diver who studied using PADI eLearning®. Explain this to the diver and emphasize the need to provide a copy of the eRecord to the receiving instructor. The eRecord shows the student diver's PADI ID, which allows the receiving instructor to process the diver's certification using the PADI Online Processing Center. If the student diver completed the associated Quick Review with you, also note that for the receiving instructor.

Receiving Instructor – If the student diver studied using PADI eLearning®, certification card processing is included. Ask the diver for a copy of the eRecord showing the diver's PADI ID. This allows you to process the diver's certification using the PADI Online Processing Center. Unless you can verify successful completion of the applicable Quick Review for digital learners, you should administer the Quick Review and/or may use it as a knowledge preassessment.

Do I get certification credit for referring entry-level divers?

Yes – referring PADI Dive Centers, Resorts and Instructors receive one-half credit for each Open Water Diver course referral if that instructor completed all knowledge development sessions and all confined water dives with the student diver.

How do I note who the referring PADI Member was?

Receiving Instructor – When you receive a student diver referred from another PADI Dive Center, Resort or Instructor, make sure to note the referring dive center, resort and/or instructor information in the appropriate spaces on the PIC (online or envelope) when submitting it for processing. This provides referring PADI Members with additional student counts as required when seeking higher PADI credentials, such as Master Instructor or Five Star Dive Center.