

PEER REVIEW HOUSING CRITERIA

Provider Name:	Case Reference Code:
Peer Reviewer:	Date:
Client's Name:	Fee Earner:
Category:	

1. Communication with the client:

Please circle one only

A. How well has the adviser taken and recorded the client's instructions?	1	2	3	4	5	
B. How effectively did the adviser identify the client's presenting issues?	1	2	3	4	5	
C. How effective were the adviser's further fact and information-gathering skills?	1	2	3	4	5	
D. How effectively was the client informed of the merits (or not) of the claim, initially, and as the case progressed	1	2	3	4	5	N/A
E. How effectively was the client informed of all developments	1	2	3	4	5	N/A
F. How effectively was the client informed of the case outcome?	1	2	3	4	5	N/A

2. The advice:

A. How legally correct was the advice given?	1	2	3	4	5	N/A
B. How tailored was the advice to the client's instructions?	1	2	3	4	5	N/A
C. How comprehensive was the advice?	1	2	3	4	5	N/A
D. Was the advice updated as the case developed?	1	2	3	4	5	N/A
E. Was the advice given in time/at the right time?				Y	N	N/A

3. The work/assistance:

A. If no other work was carried out, was this appropriate?				Y	N	N/A
B. Did the adviser properly identify what and where further fact-finding was required?	1	2	3	4	5	N/A
C. If any further fact-finding work was carried out how well was that work done	1	2	3	4	5	N/A
D. If any further fact-finding work was carried out how timely was the work executed?	1	2	3	4	5	N/A

E. Did the adviser properly identify what and where other work was required?	1	2	3	4	5	N/A
F. If any other work was carried out how well was that work done	1	2	3	4	5	N/A
G. If any other work was carried out: how timely was the work executed?	1	2	3	4	5	N/A
H. If no disbursements were incurred, was this appropriate?				Y	N	N/A
I. Did the adviser properly identify whether expert evidence was required?				Y	N	N/A
J. In relation to the use of any expert how clearly was the expert instructed	1	2	3	4	5	N/A
K. In relation to the use of any expert was effective use made of any expert evidence obtained?	1	2	3	4	5	N/A
L. How appropriate were any non-expert disbursements incurred?	1	2	3	4	5	N/A
M. How effective was any further work carried out, in seeking to achieve what the client reasonably wanted/needed?	1	2	3	4	5	N/A
N. Where necessary, did the adviser consider, advise and/or act on signposting the client?	1	2	3	4	5	N/A
O. Did the adviser or their work in any way prejudice the client?				Y	N	
P. If yes, provide details overleaf.						

Overall mark

1 2 3 4 5

Please write any further necessary comments legibly and clearly on the additional paper provided