

Connecting Advice In Dorset



Guide to Referrals between Advice Organisations

This guide has been developed to help advice organisations in Bournemouth, Dorset & Poole refer clients in the most effective and efficient way. Local Advice Networks may wish to use this guide to develop their own local referral processes.

DEFINITIONS

Signposting - Direction to appropriate resources and support, including contact details, in response to a specific issue or need. Typically the client takes responsibility for taking action and there is no attempt to feedback the outcome of the signposting.

Referral – An active process which involves transfer of a client to another organisation in response to a specific issue or need. Typically the client is contacted by the organisation to which they are referred (the receiving organisation). The referring organisation receives feedback on the outcome of the case.

The decision to signpost or refer is based on:

- The nature of the problem
- The client's ability to communicate
- The urgency of the problem
- The complexity and seriousness of the problem
- The potential impact of not getting advice

10 KEY PRINCIPLES

1. The client agrees to the referral and transfer of information and this agreement is recorded
2. The client understands the consequence of the referral (what will happen next)
[You may like to leave a card with the client to remind them of the referral details]
3. The referral is recorded by the referring organisation and the referral is acknowledged and accepted or rejected by the receiving organisation
4. Once the referral is accepted, enough client information is transferred for the receiving organisation to understand the basic issue or need and to make the initial contact (see Minimum Dataset below)
5. The referring organisation knows enough about the services provided by the receiving organisation to know that the referral is appropriate
6. The referring organisation ensures the client is aware of any cost implications from the referral and records this conversation. The referring organisation identifies any financial help available in meeting these costs.
7. Referrals are dealt by the receiving organisation within an acceptable time period
8. Wherever possible, an appointment is made for the client at the time of referral
9. Outcome information is reported back to the referring organisation
10. Data transfer is secure

MINIMUM DATA SET

Client Details

- Name and Contact details – Address, Telephone, Email
- Date of Birth
- National Insurance Number (if known)
- Ethnic Origin
- Disabilities/health Issues/vulnerability
- First/second language
- Client reference number at referring organisation
- Consent for transfer of information

Issue or Need

- Nature of issue or need
- Action so far
- Client's desired outcome
- Is there an emergency?
- Key dates and time limits
- Other related issues or needs
- Discrimination or social policy issue
- Is client in receipt of 'passporting' benefit?

Referring Organisation

- Name and Organisation
- Contact details – Address, Telephone, Email
- Feedback required

DATA TRANSFER

Transferring client information must be carried out in a secure way in order to maintain confidentiality. This could be by Phone, Fax or secure Email.

SUCCESSFUL REFERRAL NETWORKS

A referral network will be successful if the following is in place:

1. Trust between organisations and confidence in the quality of the services provided
2. Understanding of what services are provided and to what level
3. Acknowledgement of the extent of competency within an organisation
4. An agreed protocol between network members
5. Capacity in organisations to take on additional work from referrals
6. A central point of co-ordination or management of the referral network



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