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| Overview | This unit is for you if your role involves you in helping clients to recognise and access other services. You will establish that your service is unable to meet the client's needs and you will direct them to an alternative service that will be able to provide the appropriate support. This is signposting, not an in-depth client-referral process, which is covered in Unit GA5: Provide and receive referrals on behalf of clients.  **There are two elements**  1 Identify options for referral  2 Enable clients to take up referral procedures |

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| **Performance criteria**  You must be able to: | Identify options for referral   1. obtain information from clients on their requirements 2. obtain clear, relevant and current information on other services that are potentially suitable 3. assess the suitability of other services for meeting clients' requirements 4. obtain further clarification from clients what the services appear inappropriate 5. confirm the acceptance criteria of the other services 6. review the requirements of clients and check them against the acceptance criteria of other services 7. ensure the other services have the capacity and resources to deal with additional clients 8. comply with all relevant legislation, codes of practice, guidelines and ethical requirements |
| *You must be able to:* | Enable clients to take up referral procedures   1. review the referral options with clients 2. identify the advantages and disadvantages of the referral options for the clients 3. provide sufficient information in an appropriate format to enable clients to make informed decisions about the referral 4. establish the acceptability of the referral with clients 5. provide additional information and support when required by clients 6. plan the effective implementation of the referral with the client and facilitate contact with the relevant services 7. review the boundaries of confidentiality with clients and inform them of the information that has to be passed between services 8. ensure all relevant referral procedures are completed correctly 9. agree any further information or support that is required by clients 10. record details of the referral in the appropriate systems |

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| Knowledge and understanding  You need to know and understand: | Identify options for referral   1. what other services are available 2. how to obtain information on services 3. what information should be obtained 4. what types of information are particularly useful 5. what requirements might be met by other services 6. how to evaluate the suitability of other services 7. what types of additional information should be obtained 8. what other alternatives are available 9. how to obtain information on acceptance criteria 10. what the procedures of different services are 11. how to match clients' requirements against acceptance criteria 12. how to check the services' capacity and resources 13. the relevant national, local, professional and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality and data protection 14. why it is important to comply with different requirements 15. what the consequences are of not complying with different requirements 16. how to obtain information on the requirements |
| You need to know and understand: | Enable clients to take up referral procedures   1. what information should be reviewed 2. how to present referral opportunities in a positive manner 3. the potential advantages and disadvantages of different options 4. the types of information and how much will be sufficient for clients to make informed choices 5. what types of format suits different clients 6. how to check clients' views on the referral 7. what objections clients might have to other services 8. what actions should be taken if clients do not agree to the referral 9. who can provide additional information or support 10. what the timescales are for different types of referral 11. what the responsibilities of the services and of the clients are 12. the relevant rules relating to confidentiality 13. what information has to be transferred 14. the procedures for referral 15. what types of support clients require 16. who might provide additional information and support 17. what the systems are for recording referrals and the procedures for using these 18. why it is important to use the systems |

**Additional Information**

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| **Skills** | **The skills you will need to enable you to deliver the service effectively are:**  Identify options for referral  questioning  active listening  decision making  presenting information  negotiating  evaluating  Enable clients to take up referral procedures  questioning  active listening  decision making  presenting information  recording and storing information |
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