

SFJ GA4

Enable advice and guidance clients to access referral opportunities



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

- P1 obtain information from clients on their requirements
- P2 obtain clear, relevant and current information on other services that are potentially suitable
- P3 assess the suitability of other services for meeting clients' requirements
- P4 obtain further clarification from clients what the services appear inappropriate
- P5 confirm the acceptance criteria of the other services
- P6 review the requirements of clients and check them against the acceptance criteria of other services
- P7 ensure the other services have the capacity and resources to deal with additional clients
- P8 comply with all relevant legislation, codes of practice, guidelines and ethical requirements

Enable clients to take up referral procedures

You must be able to:

- P9 review the referral options with clients
- P10 identify the advantages and disadvantages of the referral options for the clients
- P11 provide sufficient information in an appropriate format to enable clients to make informed decisions about the referral
- P12 establish the acceptability of the referral with clients
- P13 provide additional information and support when required by clients
- P14 plan the effective implementation of the referral with the client and facilitate contact with the relevant services
- P15 review the boundaries of confidentiality with clients and inform them of the information that has to be passed between services
- P16 ensure all relevant referral procedures are completed correctly
- P17 agree any further information or support that is required by clients
- P18 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

- K1 what other services are available
- K2 how to obtain information on services
- K3 what information should be obtained
- K4 what types of information are particularly useful
- K5 what requirements might be met by other services
- K6 how to evaluate the suitability of other services
- K7 what types of additional information should be obtained
- K8 what other alternatives are available
- K9 how to obtain information on acceptance criteria
- K10 what the procedures of different services are
- K11 how to match clients' requirements against acceptance criteria
- K12 how to check the services' capacity and resources
- K13 the relevant national, local, professional and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality and data protection
- K14 why it is important to comply with different requirements
- K15 what the consequences are of not complying with different requirements
- K16 how to obtain information on the requirements

Enable clients to take up referral procedures

You need to know and understand:

- K17 what information should be reviewed
- K18 how to present referral opportunities in a positive manner
- K19 the potential advantages and disadvantages of different options
- K20 the types of information and how much will be sufficient for clients to make informed choices
- K21 what types of format suits different clients
- K22 how to check clients' views on the referral
- K23 what objections clients might have to other services
- K24 what actions should be taken if clients do not agree to the referral
- K25 who can provide additional information or support
- K26 what the timescales are for different types of referral
- K27 what the responsibilities of the services and of the clients are
- K28 the relevant rules relating to confidentiality
- K29 what information has to be transferred
- K30 the procedures for referral
- K31 what types of support clients require
- K32 who might provide additional information and support
- K33 what the systems are for recording referrals and the procedures for using these
- K34 why it is important to use the systems

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Additional Information

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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