



Policy	Referral Policy
Document Status:	2018 - 1
Policy Owner:	Machele Kerzinger - Director
Approved by:	Catherine Conaghan - Director
Scheduled review:	April 2020
Familiarisation Frequency:	Annually

Record of Review

Review Date	Lead by	People consulted
October 2019	Machele Kerzinger - Director	Catherine Conaghan - Director

Legislation & Reference Documents

- The Health Records and Information Privacy Act 2002 (NSW)
- Public Health Act 1991 (NSW)

Reference Documents

Linked Documents

- Access and Intake
- Assessment Policy

Supporting Forms and Documents

- Referral database

POLICY STATEMENT

Professional Care Support is committed to assisting potential and existing service users to navigate their local service provision network. Staff assists service users to choose suitable services competent to meet their needs by providing information on the types of services that are available. Systems are also in place to support negotiation and referral to local mainstream health, education, income support, disability and community providers following the establishment of service eligibility.

Potential or existing service users should agree to all referrals made to another service or received by our organisation. Service users consent should also be obtained to receive or request any type of information about them.

Professional Care Support provides referral alternatives to service users when:

- A potential service user is not eligible for services and programs
- A potential service user chooses not to continue with the intake and/or assessment process



- An existing service user chooses not to continue with his/her support plan
- A potential service user is placed on the waiting list
- A service user requires service not provided by Professional Care Support

Service users may be referred to or by a range of individuals or organisations in a number of ways, including referrals made in person, by telephone, using a referral form, letter or email. All referrals are guided by the Referral Form, which records the following information:

- Service user contact details and information
- Source and reason of referral
- Current needs and priorities
- Safety and other concerns and recommendations

Service user consent and agreement

DEFINITIONS

Eligibility – refers to the characteristics that people must possess and/or situations which people must experience in order to receive service from the organisation.

Referral – referral is defined as either making a verbal or written request seeking services for a person. It may be to a mainstream or specialist service and occurs where the service is unable to meet the service user's needs or has insufficient resources to do so

DELEGATIONS

Roles	Responsibilities
Catherine Conaghan Director	<ul style="list-style-type: none"> • Endorse and ensures compliance with Referral Policy and Procedure • Be familiar with legislative requirements of this policy
Machele Kerzinger Director	<ul style="list-style-type: none"> • Manage and monitor compliance with this policy • Support staff competence and compliance with this policy and procedure and ensures staff receive appropriate training, supervision and debriefing to comply with this policy • Collate report information on adverse service user events as required • Operational decision making is informed by this policy • Support the review of clinical processes

	<ul style="list-style-type: none"> • Support staff competence and compliance with this policy and procedure and ensures staff receive appropriate training, supervision and debriefing to comply with this policy • Collate report information on adverse service user events as required • Operational decision making is informed by this policy • Support the review of clinical processes
Staff, volunteers, contractors and students	<ul style="list-style-type: none"> • Comply with the Referral Policy and Procedure • Maintain knowledge of the current evidence-based interventions available to service users • Participate in regular practice supervision • Where appropriate maintain registration with relevant associations and/or peak bodies

PROCEDURES

Standard referral

When necessary, referral of service users to education, health, income support and other community services occurs. Staff at Professional Care Support proactively assist the service user to co-ordinate and negotiate service delivery to ensure continuity across service sectors. The process of referral aims to ease the transition for the service user:

- Referral is managed sensitively to reduce the number of service users who fall between the crack in the service system
- Referral is discussed with the service user and any concerns are addressed
- Consent or written permission is sought from the service user before contact with the new agency is made
- The service user is supported while an appointment with the new organisation is arranged and it is established that the referral was successful
- Staff work collaboratively with the new organisation to support the service user through the referral process

The standard referral process could occur as part of the exit/discharge process or as part of case management co-ordination.

Receiving a referral

Professional Care Support receives records and assesses referrals consistently in accordance with the Access and Intake and Assessment policies.



Making a referral

When making referrals workers will:

- Come to an agreement with the individual about the reason for referral – this will lessen any confusion and concerns when the referrers contact them.
- Ask service users about possible barriers (cost of service, transportation, stigma in using services) and create plans with them about how to overcome these
- Discuss and obtain consent from service users to share information with the health/community provider prior to making referrals
- Contact the provider and share necessary information (with consent) such as reason for referral, background and history, known barriers and level of priority
- Send any necessary documentation to the service provider as quickly as practical to fast track referrals
- Follow up with providers to make sure information sent was received and sufficient
- Establish follow-up plans with service users and providers to address any issues or concerns that arise promptly
- Record key actions taken and any decisions regarding referrals in service users record

Developing and maintaining referral pathways

Professional Care Support develops and maintains effective networks with other services that may be relevant and complement the organisation's services and programs to benefit potential and existing service users.

Professional Care Support establishes effective networks and referral pathways by:

- Providing clear and up-to-date information on eligibility, priorities and other referral information
- Providing complementary or specialist services to partner agencies
- Developing and reviewing agreements, terms of reference or memorandums of understandings to facilitate referral partnerships
- Maintaining open communication channels, meetings and follow-up
- Maintaining clear documentation and records of referral processes

Professional Care Support manages current referral database. The database will be on an Excel sheet on the shared drive

The document is reviewed and updated every 3 months by the team to maintain accurate and relevant data.