



## Advice Link Network Referral Guidance February 2013



**This note provides guidance on best practice and minimum standards for the way to make referrals between advice providers in Blackpool, Wyre and Fylde**

**A Referral Scheme** is founded on a common wish to build knowledge and trust between providers within Blackpool, Wyre and Fylde.

The aim is that service providers should focus on their own areas of expertise, and refer clients to another provider where necessary. The Network seeks to ensure that every service provider operating in Blackpool Wyre and Fylde has access to information of the range and level of services offered by all sectors whether Public, Not for Profit, Statutory, Private or Commercial.

Making appropriate referrals is an integral part of service provision.  
The referral form template is one way of making referrals.

This note sets out the Advice Link Network best practice guidance on supporting a service user from one supplier to another using the referral process. The referral is made direct to the provider concerned.

- Provide your name and contact details
- Discuss the need for referral and choice of supplier with the client.
- Obtain the client's consent.
- Make timely referrals for the benefit of clients
- Choose appropriate providers for the level / complexity of the enquiry
- Maintain a high level of client care and confidentiality,  
All organisations are expected to have their own risk assessment procedures for dealing with new customers.
- Take reasonable steps to ensure there is no risk to the client or receiving adviser.  
(*This is an added safeguard when referring people on to another organisation.*)
- Council staff should check on their council's CWR (Corporate Warning register) whether there is a current marker.
- If you cannot accept a referral, pass the details back to the organisation making the referral.
- It is up to individual organisations whether they ask for / provide feedback on the progress of a referral.
- Any feedback given must be within client confidentiality requirements.

If you find there is no suitable supplier to refer to, please notify the Advice Link team who will monitor this.

**February 2013**

# Advice Link Network Referral Template February 2013

The referral is made direct to the provider concerned.

Date: .....

**To:**

Organisation name	
Contact in the organisation	

**From:**

Name of referring organisation	
Contact name	
Telephone number	
E mail address	

<b>Customer Details</b>	<i>Please read the customer consent statement below</i>		
Name			
Address			
Telephone number			
Email address			
National Insurance Number (NINO)		Date of Birth	
Reason for referral			
Housing status and household composition where known.			
Income/benefit details where known.			
Additional details			
Contact suggestions E.g. Best time to call / access needs			
Risk considered and checked			

In using this form it is assumed the sender has taken reasonable steps to ensure there will be no risks to the receiving adviser. Council staff should check on the CWR whether there is a current marker. If there is a known risk, the sender must contact the receiving adviser to discuss the situation before referring.

I confirm that the customer has been informed, and agrees, that in order to provide further assistance, the information provided on this form may be passed to other Advice Link Network members. Information will remain confidential at all times and will not be used for any purpose other than that intended.

**Signature of person referring:** .....

**Date:** .....