

Referral and Signposting policy

1. Introduction and Definitions

The Advice Centre aims to provide the best quality service for all our clients. However, where clients require advice in an area that we do not cover or where another agency is able to provide a service more appropriate to the needs of a client we shall signpost the client to another agency.

The Head of Advice will ensure that our Advisers work within their competence levels through the supervision procedures.

Signposting

This is the term used when an adviser interviews a client, identifies what the query is about and decides with the client what alternative sources of help are the most appropriate.

The adviser may or may not make arrangements for an appointment there, depending on the situation (e.g. language, urgency).

Referral

This term is used when some work has been done on a particular case and the adviser identifies the need to hand over an aspect of it or the whole case to another advice or wellbeing centre. The adviser makes arrangements with the alternative agency for an appointment.

2. Services Offered

The Advice Centre provides advice to members of Southampton University Students Union (SUSU).

The main areas of support offered are around:

- Housing (inc. Halls, PBSA's and Private Rented)
- Academic issues (inc. University procedures and regulations)
- Finance (inc. Student Finance, NHS, Debt, Budgeting)

3. When to Signpost or Refer

The Advice Centre will signpost clients to another provider in the following situations:

- Requires support in areas other than those mentioned above
- Requires advice in visa or immigration issues
- Requires advice on disability or wellbeing issues
- Where there is a conflict of interest
- If the person is not a member of SUSU

The Advice Centre staff will make a referral to another centre when an Adviser identifies that any further work with a client will be beyond their competency or above the level of advice that The Advice Centre is entitled to give. The Advice Centre will only refer to other departments within The Student Union or within the University of Southampton.

4. What to Discuss with the Client

Advisers shall inform the client of the need to either make a referral or to be signposted to another organisation. Advisers shall give the client

- The reasons why it is necessary to signpost or refer
- A choice of agency (where available)
- The contact name, address and telephone number (signposting)
- The date, time and venue for an appointment (referral)

Clients shall be

- Told what to do if there are any problems

5. Procedures for Signposting

Advisers shall

- Consider the needs of the client and the level of help required
- Discuss the need for signposting and which agency to direct him or her to (see selection criteria below)
- Ensure the client has the name, address and telephone number of the organisation he or she is being signposted to, preferably along with details of opening times etc.

6. Procedures for Referrals

Advisers shall

- Consider the needs of the client and the level of help required
- Discuss the need for the referral with the client and which organisation is best suited to their needs
- Obtain the client's consent in writing and save it to our database so that details of the client's case can be transferred
- Contact the new department/service and request that they contact the client directly
- Ensure that wherever possible, the client is kept informed and updated on referrals
- Ensure the client knows exactly what help the new agency will provide
- Ensure the database is updated accordingly with information regarding the referral
- Ensure the client is informed that should he or she not receive the service expected from the new agency he or she should return to The Advice Centre

7. Selecting an Agency to Signpost to

When selecting an agency for a signposting, the following should be taken into consideration in conjunction with any preferences the client may have:

- Geographical location of the client and the new agency
- The category of advice and the level of advice required
- Cost implications
- Accessibility
- Disabled access
- Language or cultural considerations

The Advice Centre will only refer internally to Students Union departments or to other departments within the University of Southampton.

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 advice@susu.org
 **02380 592 085**

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8. Recording the Signpost and Referral

All signposting and referrals must be recorded on The Advice Centre database under 'outcomes'. This is our central record of signposting and referrals.

9. Client Feedback

Advisers should inform clients that should the agency they are referred or signposted to not offer the service described or if there are any other problems with the referral, they should return to The Advice Centre.

If the client is simply unhappy with the service provided, they should be advised to use the receiving agency's complaints procedure and should be re-referred or re-signposted.

10. Monitoring and Review

The Head of Advice and Lettings shall review the central records for signposting and referrals on an annual basis. The Head of Advice shall look for trends in the types of cases referred/signposted and the number of times where the client has been unhappy with the service provided. This information shall be fed into the annual review of the business plan.

The Head of Advice and Lettings shall review the central records of signposting/referrals to ensure that advisers are adopting a consistent approach within the procedure. The results of this review shall be fed back to advisers as part of supervision or appraisal.

Disclaimer:

While care has been taken to ensure that information contained in The Advice Centre publications is true and correct at the time of writing, changes in circumstances after the time of publication may impact on the accuracy of this information. The Advice Centre and SUSU cannot accept responsibility for any actions taken as a result of advice given in this publication.

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