



ULSU Advice Centre Signposting and Referral Policy

Sign posting & Referral

There will be occasions when the ULSU Advice Centre is unable to assist a client with an enquiry, and another agency or expert is better placed to assist them.

Advice Centre Staff decide whether the ULSU Advice Centre has the necessary resources and expertise to deal with the enquiry. If the Advice Centre cannot provide the necessary support, they should signpost or refer the student to a more specialist service.

Referrals in which the ULSU Advice Centre does not retain ownership of the client

If the client's enquiry involves expertise beyond the capabilities of ULSU Advice Centre staff, the Advice Centre Staff should explain this to the client and discuss signposting or referring them to a more appropriate agency.

Where a case with the Advice Centre has been opened and the Advice Centre has established a relationship with the client, the Advisor should discuss the option of a referral with the client. If the client agrees to the referral, this should be noted on the case record and the Advice Centre Staff should contact the referral agency directly to explain the client's situation and ask the service to make contact with the client.

For any referrals, express consent must be given via the ULSU Advice Centre Information Sharing and Storing Data Consent Form which should be completed in full prior to referral. Signposting to another agency will be appropriate if the ULSU Advice Centre cannot deal with the enquiry, and no work has been completed by the ULSU Advice Centre. The client must be given an explanation as to the reason for signposting them.

Referral and signposting may occur at any time during a client's contact with the ULSU Advice Centre. The client must be fully informed of why the Advice Centre is referring them to another service and that the Advice Centre is acting in their best interests.

In cases where the client has been referred to an alternative service and there are no issues the Advice Centre can continue to work on, their case shall be closed.

Use of external agencies where the ULSU Advice Centre retains ownership of the client

As part of the case work done on behalf of a client, Advice Centre Staff may contact an external agency for advice on how to proceed.

In these instances, the client has not been referred to the agency as the ULSU Advice Centre still retains ownership of that client.

If Advice Centre Staff recognise that they need to contact an external agency, they should discuss this with the client and gain their consent via the ULSU Group Advice Centre Information Sharing and Storing Data Consent Form.

The external agency should be contacted as soon as possible and their advice fed back to the client promptly so that the client can decide what action they wish to take. The information and any action should be recorded on the client's record.

Last Reviewed: August 2020

Next Review Date: August 2021