Client Referral – Policy Statement and Procedure

Aim
To provide effective referral for clients when another adviser or provider offers services that more closely meet the client’s needs.

Policy Objectives
- Following initial client contact, advice desk or guidance discussions, to refer clients to other appropriate sources of help, within the Careers Network, the university and externally, when they more closely meet the client’s needs.
- To ensure that information on other services and providers is comprehensive and up-to-date and is accessible to all staff making referrals.
- To ensure that information on other sources of help is given to clients clearly and in the appropriate format (verbal or written).
- To ensure that the referral process supports and promotes equality of opportunity and includes, where appropriate, additional support for clients with particular needs and for those who face stereotyping or other barriers in pursuing their career plans.
- To maintain client confidentiality (as defined in the Careers Network Confidentiality Statement).

To monitor and review the referral process with the purpose of developing and improving it and to feed into staff training and Careers Network strategy.

Procedure for implementing the policy

Other providers or advisers
These could include:
- Careers Network staff.
- Staff in schools and departments.
- Other university services such as those listed on the Student Support website http://www.as.bham.ac.uk/study/support/.
- Sources of help external to the university e.g. other careers services, disability organisations, professional bodies.
Process for referral

1. Open referral

Open referral covers the majority of referrals made by Careers Advisers and Information Room staff. This is where clients are encouraged to make contact themselves with the party to which they are being referred. It will be up to the client to decide whether or not to follow up any recommendation and to take action to contact the relevant service(s). In making open referrals, staff will:

- Explain why they are doing this, indicating what help can be expected.
- Provide clear contact details either verbally, or in writing using the referral details form.
- In the case of referral to another Careers Adviser (CA) in the Careers Network, staff should follow the CA appointment procedure or mock interview procedure, or advise the client on the CA’s Advice Desk availability.
- In the case of a student considering withdrawal from their course, it is normal practice to refer the student to their personal tutor and the ARC, and to Counselling and Guidance if appropriate. Additionally referral may be made to appropriate external agencies.
- Where appropriate, mention the possibility that the help/advice received from the referred source might not be impartial and that the Careers Network is not responsible for the help/advice given by a third party.
- Include details of the referral in Advice Desk notes facility or post guidance discussion notes following a booked appointment.

2. Assisted Referral

Assisted referral occurs where a member of staff, with the permission of the client, makes contact with the referral source on behalf of the client (for example to Counselling and Guidance). In addition to the points above, staff will agree with the client, what information will be passed on to the third party when arranging the contact. A referral details form should be completed as described above.

3. Referral where clients are at risk

Referrals are made within the terms of the Careers Network’s confidentiality statement. However, in the very rare event of a client being assessed at risk either to themselves or to others and if they are unwilling or unable to contact the recommended third party themselves, then staff will assume responsibility for acting to ensure the health and safety of the client or others e.g. by seeking medical assistance. Where appropriate, the staff member dealing with the client should consult with Careers Network management staff before taking action.

4. Feedback

Clients have the opportunity to provide feedback on whether the referral was helpful and appropriate to their needs. Feedback or comments which require further action by the Careers Network will be followed up and the client will be advised of any action taken.