PROVIDING INFORMATION, ADVICE AND REFERRAL POLICY AND PROCEDURE

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Purpose and Scope

The purpose of this policy and procedure is to ensure Bilingual Care's consumers access services most appropriate to their needs through timely and responsive service integration and referral. It interlinks with Bilingual Care's *Care Management Policy and Procedure* which describes how services must be coordinated in the best interests of consumers, and the *Associated Providers Policy and Procedure*, which describes how organisations are contracted to Bilingual Care.

This policy and procedure applies to all staff, potential and existing consumers, their family and carers, supporters and representatives, as well as other Bilingual Care stakeholders, and meets all legislation, regulations and Standards.

Applicable Strengthened Aged Care Quality Standards

- *Standard 1. The Individual*
- *Standard 3. The Care and Services*

Definitions

Active referral - Bilingual Care, with the person's consent, provides the organisation to which it is referring the person with information that it has collected about the person or with its professional assessment of the person's needs.

Associated Provider: a third-party organisation or worker engaged to deliver Support at Home services on behalf of Bilingual Care.

Cold referral - a caller is referred or transferred to another service, without any immediate communication between Bilingual Care and the other service.

Facilitated referral - a person is helped to access another service, for example, Bilingual Care makes an appointment with the other service on the person's behalf, asks the other service to contact the person, or phone transfers the person to the other service.

Passive - a person is given contact information for appropriate services so they can make their own contact at a time that best suits them.

Warm Referral - A 'live' three-way conversation in the presence of the consumer (whether face to face or by telephone) in which Bilingual Care introduces the consumer, explains what has already been done to assist the consumer, and why they are being referred.

Policy

Bilingual Care works proactively to build a network of other individuals, organisations, and providers that it can refer or collaborate with so that it can meet the diverse needs of consumers.

Bilingual Care will inform the community, potential consumers, and other services about its services and access requirements through active engagement strategies that encourage and facilitate consumer and stakeholder participation.

Procedures

Service Network Engagement

Bilingual Care's Managing Director will:

- build strong relationships with local government and non-government providers, agencies, health services and advocacy services and participate in relevant local networks, to increase service and referral options for its consumers and other stakeholders
- build strong relationships with relevant Aboriginal and Torres Strait Islander and culturally and linguistically diverse (CALD) services to support Bilingual Care to identify and meet consumers' needs and goals, as well as contribute to more coordinated service provision, better use of resources, and improved outcomes for consumers and communities. This includes active involvement with Aboriginal and Torres Strait Islander and CALD communities and services, such as participation in community events, collaborative service provision and referrals
- collaborate with local Aboriginal and Torres Strait Islander and CALD service providers to assist culturally safe and sensitive service delivery, ensure staff are adequately trained and sensitive to the specific cultural needs of the service area (including in the development of referral practices), and generally facilitate participation of stakeholders from these backgrounds in the service and community
- build strong relationships with specific needs to contribute to more coordinated service provision, better use of resources and improved outcomes for consumers, as per the *Inclusion, Diversity and Culturally Safe Service Delivery Policy and Procedure.* The Managing Director will collaborate with these services to ensure service provision is meaningful and sensitive to people with particular needs, and staff are adequately trained
- where applicable, develop clear protocols with other service providers (including medical officers and health professionals), such as memorandums of understanding, which outline relationships and delineate the roles and responsibilities of collaborating agencies. The Managing Director will be responsible for establishing, reviewing and modifying such agreements
- attend interagency meetings as a means of linking with other service providers and to inform Bilingual Care of other service and referral options
- retain records of service network involvement, such as meeting minutes and communications, in accordance with Bilingual Care's *Records and Information Management Policy and Procedure*, to inform continuous improvement and
- review Bilingual Care's participation in service and referral networks on an annual basis to ensure the arrangements in place are the best use of Bilingual Care's resources and are providing the best possible outcomes for Bilingual Care's stakeholders.

Service Promotion

The Managing Director will ensure Bilingual Care:

- is listed on relevant directories, including checking the accuracy of information published on the 'Find a Service' tool on the *My Aged Care* website and that information on Bilingual Care's website is current and accurate
- distributes information about its services in appropriate formats to local government and non-government providers and agencies in the organisation's geographical service area and
- prominently displays information (such as brochures) in its foyer regarding alternative services and local community participation options for consumers and other stakeholders. Where possible (noting that the bulk of this collateral will be provided by other providers) information will be provided in a variety of formats, including staff explanation where necessary. Where consumers are not accessing services at Bilingual Care premises, staff can provide them with brochures or information that may be of interest to them.

The Managing Director will maintain a comprehensive *Referrals Database*, which will be continuously reviewed and built upon by all staff responsible for service delivery oversight.

Referral and Information Sharing

The Managing Director will respond to referrals and requests for its services in accordance with its *Service Access and Intake Policy and Procedure*. Referrals required as part of Bilingual Care's support of a consumer will be dealt with in accordance with this and other relevant Bilingual Care policies and procedures.

Bilingual Care will work collaboratively with all people refused services or leaving Bilingual Care, and their representatives, to identify what alternative services and referrals could best meet their needs.

The need for consumer referrals is based on Bilingual Care's *Initial Assessment and Care Planning*, *Care Review* and *Service Delivery and Participation* policies and procedures. In all cases, referrals to other services will be made within 2 working days, except where the situation is urgent. Urgent referrals should be made within 2 hours (or immediately where the person is at risk of immediate harm).

Where referral to an associated provider's is required, as per Bilingual Care's *Associated Providers Policy and Procedure*, prior to a referral being made, the consumer must be offered a variety of choices. First and foremost, the consumer and their representative must be asked if they prefer where the referral is made. Where Bilingual Care has assessed the need for a referral however the consumer or their representative have not identified a preferred service provider, they must be given detailed information (in a format and language to meet their needs) about each already established service provider that Bilingual Care contracts as an associated provider. This information must be provided without bias or Bilingual Care's staff preference.

Staff making referrals must have an accurate knowledge of the services provided by other agencies and actively contribute to the continuous improvement of Bilingual Care's *Referral Database*.

Staff must provide referrals with empathy and respect, a non-judgemental attitude, and sensitivity to the person's needs. Where required, consumers will be provided with information

and support to access a person of their choice, such as an advocate, to assist them to interact with Bilingual Care. See Bilingual Care's *Decision Making, Dignity, and Choice Policy and Procedure*.

When providing referrals, staff must consider:

- the person's most pressing needs (including those relating to health)
- the person's preferences and goals for care
- safety issues and whether a referral will compromise the person's safety
- the level of distress experienced by the person (for example, it may be necessary to calm the person or seek the support of a more senior staff member before referring them on to other services)
- the needs of vulnerable people and people with complex needs or at high risk
- the person's age, ability, gender, sexual identity, culture, religion, specific needs, spirituality, and language and communication needs and
- other services the person is already receiving and from where.

Staff must be aware of possible barriers that a person may experience in using another service and, where feasible and appropriate, work with them to find ways to overcome these barriers. Barriers may include:

- lack of information about services and what is available
- lack of consumer capacity or interest in taking up a referral
- waiting lists that are too long to meet the consumer's needs
- difficulties advocating for their needs or preferences
- cost
- cultural or language barriers
- difficulties in contacting the consumer (e.g., lack of phone services)
- family ties
- lack of anonymity in small communities
- lack of interpreters
- lack of services particularly in rural and regional areas and
- lack of transport options.

Staff will be assisted to support individuals with specific or complex needs through ongoing formal and on-the-job training and professional development opportunities.

Staff must acknowledge and address any concerns and explain the reasons why a particular referral has been made. Where more than one service may assist a person, it is appropriate to provide them with information about the range of services available and give them choice over which service or services they want to use. In doing so, staff may need to provide some guidance on any special conditions for using a service. It is important to refer people to the most appropriate service at the right time and avoid a 'merry-go-round' of referrals.

Staff should use facilitated, warm or active referral processes where feasible, especially for consumers who are likely to have trouble using other services without assistance. Where a referral is a passive or cold referral, staff should provide sufficient information to the person to help make the referral successful. Where appropriate, staff may also follow up with the person to ensure the referral was effective.

Where a person is not satisfied with referrals provided or the integration of supports provided by Bilingual Care with other services, they will be directed to Bilingual Care's feedback and complaints processes.

Where required, information about alternative services, Bilingual Care's referral processes and Bilingual Care's feedback and complaints processes will be provided to people in alternative formats that facilitate their understanding. Information about Bilingual Care's referral processes and information sharing provisions will be included in its *Consumer Information Pack* and provided where required by staff, including during service delivery.

Service access and refusal and referral information will be tracked in Bilingual Care's Ezihealth and on consumer files. Records will include the timeframes within which incoming referrals were actioned or outgoing referrals made.

Information Sharing Provisions

When sharing a person's information with another service, staff must:

- give priority to a person's best interests, including the need to maintain a person's health, protect them from harm, protect their rights and promote their development
- only share information as authorised by privacy legislation (see Bilingual Care's *Privacy and Confidentiality Policy and Procedure*)
- seek consent, where this is possible, before sharing information and where this does not place the person or any other person at risk
- exercise professional judgment – use their professional skills, knowledge, and experience – in deciding what action to take in regard to a vulnerable person and
- consult with a senior staff member where they are unsure of what to do.

Ongoing Monitoring

The Managing Director is responsible for:

- the ongoing monitoring of referral appropriateness and the effectiveness of brokered consumer care and services, including any associated provider services
- regularly communicating with associated providers, including establishing the main contact and maintaining expectations and compliance with those providers
- ensuring care and services delivered externally is culturally safe and appropriate and meets consumers' needs, goals, and preferences. This will be achieved and measured through feedback provided by consumers and their representatives.

Supporting Documents

Documents relevant to this policy and procedure include:

- *Associated Providers Policy and Procedure*
- *Care Review Policy and Procedure*
- *Decision Making, Dignity, and Choice Policy and Procedure*
- *Initial Assessment and Care Planning Policy and Procedure*
- *Privacy and Confidentiality Policy and Procedure*
- *Records and Information Management Policy and Procedure*
- *Service Access and Intake Policy and Procedure*
- *Service Delivery and Participation Policy and Procedure*
- *Consumer Information Pack*
- *Referrals Database*

Monitoring and Review

This policy and procedure will be reviewed at least annually by the Leadership Team. Reviews will consider staff, consumer, and other stakeholder's feedback and incorporate reviews of:

- service involvement and links with Aboriginal and Torres Strait Islander, CALD and other specific needs communities and services
- Bilingual Care's service network and referral processes and
- feedback from staff, consumers, and other stakeholders on their satisfaction with Bilingual Care's service integration and referral management.

Service access, refusal and referral information will be tracked in Bilingual Care's Ezihealth.

While delivery staff are responsible for actively updating Bilingual Care's *Referral Database* on an ongoing basis, the Managing Director will formally review the Database every six months to ensure the currency and relevance of the information it contains.

Bilingual Care's *Continuous Improvement Plan* will be used to record and monitor progress of any improvements identified. Where relevant, this information will be considered as part of Bilingual Care's service planning and delivery processes.

DOCUMENT CONTROL

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