

GEN123 Work with others to facilitate the transfer of individuals between agencies and services

OVERVIEW

This standard covers working with staff in other agencies and services to ensure individuals experience a seamless transition between agencies and services. In the context of this standard the term 'transfer' covers all types of referral and shared responsibility for individuals, including: where individuals are transferred to another agency/service on a long-term or permanent basis; where individuals are transferred to another agency/service for specific short-term interventions; where the agencies/services concerned have shared responsibility for the care and treatment of individuals; where the 'receiving' agency/service provides advice and guidance to the referring agency/service which remains responsible for the care and treatment of the individual. This standard applies to those who work with others to facilitate the transfer of individuals between agencies and services. This role may be carried out for an agency/service which refers to and/or accepts referrals from other agencies/services. The job holder will be responsible for managing boundary issues between the agencies or services concerned and may or may not be directly involved in individual transfers. Users of this standard will need to ensure that practice reflects up to date information and policies. Version No 1

KNOWLEDGE AND UNDERSTANDING

You will need to know and understand:

1. how to promote and sustain effective working relationships with other agencies/ services
2. the barriers to effective working with other agencies/services and how these can be overcome
3. the different sources from which referrals are received and/or the agencies/services to which referrals are made
4. the roles, structures and functions of the different agencies/services who make/receive referrals
5. the information systems used by your own organisation and those with whom you work to make/receive referrals and how to obtain information from them
5. how to evaluate referral information for its appropriateness and sufficiency for the receiving agency/service and determine whether it provides a sufficient basis for moving forward
6. the rights of agencies/services to refuse referrals and the reasons why this might be done

- 7.the impact of a range of organisational and national factors on whether referrals can be accepted and the timing of the transfer
- 8.the reasons for inappropriate referral patterns occurring
- 9.long and short term strategies for dealing with inappropriate referral patterns
- 10.the purpose of protocols and the relevant protocols for making/receiving referrals from/to your organisation
- 11.methods of monitoring individual's needs and the effectiveness of interventions in meeting those needs
- 12.methods of encouraging a range of people from both the referring and receiving agency/service to take a full and active part in the review of the referral process and outcomes
- 13.the importance of identifying when the transfer of an individual between agencies/services is not achieving its agreed aims and recognising when this is a one-off situation or indicative of inappropriate referral processes
- 14.modifications that might be made to referral processes to make them more effective in achieving successful outcomes

PERFORMANCE CRITERIA

You must be able to do the following:

- 1.evaluate individuals' needs and preferences against agreed criteria laid down for agencies or services using the appropriate protocols
- 2.identify the agency or service which can best meet the needs of an individual
- 3.take appropriate action to identify a suitable agency/service when one is not readily available to meet the individual's needs
- 4.evaluate referral information for its appropriateness to the agency or service concerned
- 5.obtain further relevant information where the referral information is insufficient to allow an effective assessment to take place
- 6.effectively monitor referrals to identify inappropriate patterns and take appropriate action to help solve the problem
- 7.ensure agreements and arrangements to transfer individuals between agencies or services are fully and accurately recorded using agreed protocols
- 8.only transfer individuals between agencies or services when they meet the agreed criteria and priorities
- 9.ensure that the level and nature of contact and collaboration between agencies or services are agreed and complied with
- 10.monitor the progress which individuals have made towards agreed goals and discuss this with the agencies or services concerned
- 11.monitor the effectiveness of the agencies or services in working together to meet individuals' needs and deal promptly with any disputes, disagreements and misunderstandings
- 12.encourage everyone involved to contribute their views and come to an agreed understanding as to the effectiveness of the referral process and outcomes
- 13.identify where the transfer of an individual between agencies or services is not achieving its agreed aims and discuss the reasons for this with the agency or service concerned

14. agree and implement modifications to the referral process with those concerned to ensure the suitability and success of transferring individuals between agencies or services

ADDITIONAL INFORMATION

This National Occupational Standard was developed by Skills for Health. This standard replaced MH83. This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004): Dimension: HWB4 Enablement to address health and wellbeing needs