



POSITIVE FUTURES

ACHIEVING DREAMS. TRANSFORMING LIVES.

Name of Policy:	Referral, Assessment and Transition Policy		
Policy Lead:	Operations Director		
Next Review Date:	10.08.25		
Change Record			
Issue Date	Nature of Change	Ratified by	Date ratified
	First issued		
16.12.03	Re-issued		
01.12.08	Referral and Assessment Standards combined into single policy; referral and assessment criteria revised to provide greater clarity on cultural identity, mental health and behaviours that challenge; reviewed in context of existing practice and RQIA Minimum Standards		
10.04.13	Inclusion of information about the person being referred being able to choose where and with whom they live; evidence how people are consulted with (those moving to the Service as well as existing tenants); assessment to support the separate provision of care and accommodation; the person entering the Service chooses who supports them	SLT	26.03.13
20.07.16	Clarification that policy relates to SLSs rather than all “adult services”; policy and procedure separated; greater emphasis on transition processes; policy renamed “Referral, Assessment and Transition”; “Guidance for supporting people to access our adult services or enter accommodation” incorporated into procedure; referral form updated for SLSs; introduction of Transition Action Plan and Offer of Service templates	Directors	06.06.16
01.08.17	Explicit reference to ensure people’s housing related support needs are considered as a central part of the referral, assessment and transition processes	Directors	21.07.17
07.09.17	Extended to incorporate arrangements for Wheatfield Short Break Service	Directors	07.08.17
27.05.22	Reviewed; no changes	Directors	27.05.22
10.08.22	No changes	OD	04.08.22

Referral, Assessment and Transition Policy

Aims

To:

- Outline the process for entering our Supported Living Services (SLSs) and Wheatfield Short Break Service (WSBS) for individuals, their representatives, and agencies making referrals and to ensure this process is fair and consistent
- Ensure our positive approach and focus on person centred practice begins at the referral stage and continues throughout initial assessment and transition
- Develop a detailed outline of the support required to meet people's needs, preferences, any associated risks and planned outcomes
- Ensure clarity when determining whether a service can meet the needs of an individual
- Ensure that the individual is central to the decision making process throughout referral, assessment and planning of support
- Ensure that, where relevant for support in our SLSs, a person's housing related support needs are considered as part of the referral, assessment and transition processes
- Ensure that staff understand their responsibilities in the referral, assessment and transition processes
- Ensure effective and safe transition when people start to be supported by our SLSs
- Ensure an effective and safe initial first overnight stay for people in need of short breaks.

Context

Any person who is supported by our services has the right to have choice, control and freedom over where, with whom and how they live. They also have the right to choice and control over the support they need in their daily lives. A transparent and accessible person centred referral and assessment process is essential in achieving this. The associated procedures outline the specific referral, assessment and transition processes.

For SLSs, this policy and associated procedure reflect the principles of the people we support choosing where and with whom they live, the separate provision of care / support and accommodation and identifies who supports the person and how they are supported.

Policy Statement

We will take a fair, consistent, effective and person centred approach for all referrals to our services.

People being supported by our SLSs will choose where and with whom they live and which staff will support them.

The people we support in our SLSs will have equal rights to access rented housing and home ownership options. People’s housing related support needs, where relevant, must be a central element of the referral, assessment and transition processes completed prior to the provision of support.

Related Documents

Procedures

- [Referral, Assessment and Transition Procedure – Supported Living Services \(SLSs\)](#)
- [Referral and Assessment Procedure – Short Break Service \(SBS\)](#)
- Referral, Assessment and Transition Procedure – Residential Children’s Services (in development)

Forms/Templates

Supported Living Services

- [Referral Form](#)
- [Initial Assessment Form](#)
- [Transition Action Plan](#)
- [Full Assessment Form / Offer of Service](#)
- [Commencement Form](#)

Short Break Services

- [Referral Form](#)
- [Initial Assessment Form](#)
- [Full Assessment Form](#)

Useful resources

- [Example of HSCT supporting letter re property](#)
- [Example Compatibility Assessment Tool](#)

How has this policy been informed by staff, volunteers and the people we support?

The policy has been reviewed with the Operations Team and Service Managers.