

## **Guidelines for Referrals and requests for information about services**

The CaPPP committee have formulated the following guidelines, to help us all with taking care around information disclosed about the client seeking a therapist or services. The template for referrals is below and **MUST** be used when making a referral or request for information about services.

- a) The request for referral should be brief, focusing on the type of therapist/therapy / service required e.g. location, maximum fee, times, specialist knowledge or approach etc. The referrals **should not** be of a narrative nature either in the client's, their parent's or the therapist's words.
- b) The client's identity should always be protected.
- c) Any personal information should be kept to an absolute minimum, e.g. approximate age or gender can be given if relevant, but not their name, contact details, where they live, their story or issues.
- d) The client's consent must be obtained before disclosing this information.
- e) The referring therapist should not disclose their relationship to the client or their views about the client.
- f) Replies should be addressed back to the CaPPP member making the request not to the CaPPP forum ie use **Reply** not **Reply All**
- g) CaPPP members making the request should not make recommendations to the client about therapists but should merely pass on the information received. If you are concerned about a referral request on CaPPPchat which you feel reveals too much information please contact the CaPPP administrator.

### **CaPPP templates for referrals and replies**

The following templates **must** be used to keep referrals simple and within the guidelines above

CaPPP template for **referrals**:

- Male or Female therapist (if specified by client)
- Acceptable locations
- Maximum fee (if specified)
- Times specified
- Any specialist approaches or areas of experience specified
- Approximate age of client if relevant
- Any other restrictions or specifications: no narrative to be included

Template for **replies**:

- Name of therapist / service
- Contact details (telephone, email, website)
- Location
- Availability
- Fee
- Any other information which may be helpful to the client

## Examples

Do not include narratives such as:

“I’ve had a request from a client, they say it’s okay to tell you they’ve been suffering anxiety for seven years. They have recently been made redundant and since they live in Southmead they need someone local. They’re in their twenties and have issues with their family.”

INSTEAD make it about the therapy / service needed ie

Therapist / service needed in or around Southmead

Low Cost preferred

Any time

Experience of working with anxiety

If in doubt about the format or information acceptable in a referral please contact the administrator [admin@capp.co.uk](mailto:admin@capp.co.uk)

Reviewed and amended August 2020