



Essential Notes on the **Safe And Independent Living (SAIL)** Referral Process

The Dorset SAIL scheme has been up and running since April 2010 and this has given us the chance to make a few observations on the process as follows:

1. The SAIL referral form provides the opportunity for people to gain access to information, services and support.
2. The SAIL programme is aimed to support people aged 50+ and people of any age deemed eligible by the partner agency completing a referral form with clients/service users.
3. The scheme is live across Bournemouth, Poole and Dorset.
4. The client is the one who decides if they want to complete the form. As a partner agency you can assist with this, but the client/service user has to sign the form after agreeing to the information sharing note at the end of the form.
5. If completing the form over the telephone there is a tick box for client consent at the bottom of the form.
6. The partner agent representative should make it very clear that if 'yes' is circled on the form, **an action WILL take place** as a result, and a **third party agency WILL then contact the client/service user**.
7. Anything written on the form is written with the consent of the client. Anyone completing the form should avoid assumptions regarding the clients/service user' circumstances, or any conditions or health issues that they may have. Ensure that appropriate language and terminology is used in relation to circumstances and conditions, and clarify this with the client if in doubt.
8. **Ensure that you leave a SAIL calling card with the client/service user**, and 'tick' the agencies named on the card that are going to be contacting the client as a result of the referral. Please explain the card to the client so that they know they can phone Age UK Dorchester if concerned about anything.
9. Confidentiality is of paramount importance – do not share details that have been recorded on the form with anyone outside of the SAIL process.
10. Use of email – do not identify any details of a client (including name, address, or referral need) in the subject bar of any emails relating to a referral.
11. Referrals will be forwarded by Age UK Dorchester to the partner agency expected to undertake one specific action only. A completed referral form sent in to Age UK Dorchester will generate a number of single referrals out to individual agencies.
12. If you are a partner agency attending to undertake an action, please indicate on the calling card that you have visited to do so.

**For more information please call Sue Warr on 01305 224841 / 07979 704059
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