

Referrals are made to Taikura Trust for one of four key reasons:

- To request a review of the Disability Support Services (DSS) the person is currently receiving (this will generally be generated by the perception that the person requires more or different DSS than they are currently receiving).
- To request the addition of services (contracted or via discretionary funding) by Taikura Trust to the services the person is already receiving, who will continue to have primary responsibility for the person.
- To engage with Taikura Trust in a joint and collaborative process of developing and funding a package of services/supports to best meet the person's needs where their needs for care relate to both an "eligible disability" and a health condition, mental health condition or disability covered by another Health and Disability sector (i.e. they have Dual Disability).
- To arrange to transfer the responsibility for funding/services for a person from the current agency, sector/funder to DSS via Taikura Trust, where the person's needs are driven by an "eligible disability" and they have either no other condition/disability at all, or such condition they have makes only a very minor contribution to their needs.

### **Sources of referral**

Referrals to Taikura Trust may be made by a variety of staff roles within the agency/sector making the referral (e.g. Key Worker, Social Worker, Needs Assessor, Service Coordinator etc.). The key thing is whoever makes the referral needs to know how Taikura Trust works; how and when to make the referral; and enough about the referred person to write the referral letter.

Once the referral has been made however, Taikura Trust will need a key point of contact within the referring agency or sector, with whom to coordinate discussions/negotiations about service coordination, funding, placements etc. The key thing here is whoever provides this key point of contact needs to know what services are available in their sector and how to refer to them; understand service coordination; have practical experience of co-funding; and either have the authority to make funding decisions, or have direct access to someone who has.

### **Making the referral**

The referral is made using the following three key items:

- A referral letter
- A copy of a current Assessment or Review report
- Copies of any relevant Specialist Assessors' reports.

### **The referral letter**

The referral should be made using the Referral Letter Template and should include the following:

- The personal and contact details of the referred person.
- The person's current circumstances, their natural support networks and the services, if any, they are currently utilising.
- The context, reason and rationale for the referral.
- A clear description of the nature, severity and significance of all the conditions or disabilities the person has, including the inter-relations between these conditions/disabilities (indicating the reports this Disability Profile is based on).
- A summary of the person's most recent assessment or review (include assessor's name, agency and date) and a summary of the outcomes of the assessment (including – identified clinical and support needs, required level of care; and the relationship between the person's health conditions/disabilities and their needs for care).

- The name, designation and contact details of the person making the referral.
- An indication of who the key contact will be for following up the referral.

### **Specialist Assessors' reports**

Some specialist assessments focus on diagnostic issues; while others focus on functional capacity, or treatment, or even dispositional issues; while yet others cover more than one aspect. All relevant Specialist Assessors' reports should be attached to the Taikura Trust referral letter, but diagnostic reports are of particular importance because they speak to the person's eligibility for receiving Ministry of Health funded DSS by virtue of having one (or more) of the four eligible disability types (i.e. an Intellectual, Sensory or Physical Disability; or Autism Spectrum Disorder; or any combination of these).

For referrals of people who are new to Taikura Trust, we believe it is generally the responsibility of the referring agency or sector to arrange the diagnostic assessments to establish the presence of the eligible disability prior to making the referral. Likewise, Taikura Trust will take responsibility for arranging any required diagnostic assessments to establish the presence of an "eligible disability" for people already accessing DSS.

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