



Client Suitability and Safe Access Policy

A fair, consistent and compassionate framework for deciding whether LilyAnne's can safely meet a person's needs.

LILYANNE'S WELLBEING POLICY

SAFE ACCESS • INDIVIDUAL NEED • REASONABLE ADJUSTMENTS • SIGNPOSTING

Live policy

Effective September 2026 • Review by September 2027

Document control

Document owner	Chief Executive / Clinical Lead
Applies to	Trustees, employees, counsellors, volunteers, students and referral decision-makers
Status	Live
Version	2.0 - effective September 2026
Effective date	September 2026
Next review	September 2027, or sooner if required

This is a live LilyAnne's Wellbeing policy. It applies from September 2026 and should be read alongside the related policies and procedures identified in this document.

Purpose

This policy supports safe, equitable and transparent access to LilyAnne's counselling, listening, peer and wellbeing services. It helps staff decide whether the charity can meet a person's needs within its competence, resources and service boundaries.

Core principles

Suitability is considered individually. A diagnosis, disability, communication difference or previous use of services must never be treated as an automatic reason to refuse support.

- Listen to the person's wishes, strengths, risks and preferred outcomes.
- Make reasonable adjustments and use accessible communication.
- Avoid discriminatory assumptions, diagnostic gatekeeping and blanket exclusions.
- Choose the least restrictive safe response and explain decisions clearly.
- Signpost or refer on where LilyAnne's is not the right service.

Scope and eligibility

The current service offer, age range, geography, funding conditions and referral route must be checked at the point of referral. Public information and referral forms must remain consistent with approved service criteria.

- A person may self-refer or be referred by a professional where the relevant service permits.
- No formal autism, ADHD or other neurodivergence diagnosis is required unless a specific funded programme states otherwise.
- Consent is normally required before discussing a referral with another person, subject to safeguarding and legal exceptions.

Initial suitability assessment

A trained worker will review the referral and, where appropriate, hold an initial conversation. The assessment is proportionate and records only information needed to decide the next step.

- Presenting needs, goals and preferred type of support.
- Immediate safety, safeguarding and crisis concerns.
- Communication, sensory, access and reasonable-adjustment needs.
- Existing professional support and whether coordinated working is required.
- Any conflict of interest, dual relationship or boundary concern.
- Whether staff competence, supervision, facilities and resources are sufficient.

When LilyAnne's may not be the right service

LilyAnne's is not an emergency service and does not replace urgent, statutory, medical or specialist treatment. A service may be unsuitable where needs are outside its remit or safe capability.

- Immediate danger or a medical emergency requires 999 or urgent NHS support.
- Needs require a level of clinical monitoring, detoxification, inpatient care, statutory intervention or specialist treatment LilyAnne's does not provide.
- Risk cannot be managed safely within the setting, staffing or agreed service model.
- The requested work creates an unmanaged conflict, dual relationship or professional-competence issue.
- The person needs a different provider, while still being offered compassionate explanation and signposting.

Risk, safeguarding and urgent support

A disclosure of suicidal thoughts, self-harm, abuse or neglect does not automatically make a person unsuitable. Staff must follow safeguarding and risk procedures, seek clinical or safeguarding advice, and agree the safest available response.

- Call 999 where there is immediate danger or a life-threatening emergency.
- Use NHS 111 and select the mental-health option where urgent help is needed but the situation is not immediately life-threatening.
- Share information lawfully and proportionately when necessary to protect a person or others from serious harm.

Decision, communication and review

The decision and reasons must be recorded. The person should receive a clear, respectful explanation, information about alternatives and how to ask for the decision to be reviewed or make a complaint.

- Complex or high-risk decisions require review by the Clinical Lead and/or Designated Safeguarding Lead.
- A suitability decision may be revisited when circumstances, risk, capacity or available support change.
- No one should be left without urgent signposting when a safety concern has been identified.

Records, confidentiality and equality

Suitability records are confidential special-category information and must be accurate, relevant, access-controlled and retained under the charity's retention schedule. Equality impacts and patterns in declined referrals should be reviewed by trustees without using unnecessary identifiable data.

Related documents and references

- Equality Act 2010 - legislation.gov.uk/ukpga/2010/15/contents
- Data Protection Act 2018 and UK GDPR - ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/

- LilyAnne's Wellbeing Safeguarding Policy and Privacy Notice.
- Care and support statutory guidance, chapter 14 - [gov.uk/government/publications/care-act-statutory-guidance](https://www.gov.uk/government/publications/care-act-statutory-guidance)
- BACP Ethical Framework for the Counselling Professions - [bacp.co.uk/events-and-resources/ethics-and-standards/](https://www.bacp.co.uk/events-and-resources/ethics-and-standards/)