

## REFERRALS UNIT SUPERVISOR

\*\*\*\* Read This Entire Checklist Before Taking Action \*\*\*\*

**Reports to:** Primary Services Branch Coordinator

**Title (if this function is staffed):** Referrals Unit Supervisor

Note: While this function is normally combined with the "Registration" function, separate supervisors are recommended.

### Responsibilities:

1. Oversee the implementation and operation of the Referrals function.
2. Ensure proper completion of Referral forms.
3. Provide direction and support to Referrals workers
4. Communicate with the ESS Branch Coordinator at the PREOC or the ESS Office at PEP Headquarters for:
  - addressing questions or concerns regarding completion of Referral forms or the ESS Payment Process, and
  - requesting authorization for Referral expenditures beyond those services already described on the ESS Rate Sheet.
5. Liaise with the Resource Acquisition Unit and ensure Referrals Workers are kept advised of available resources (e.g., lodging spaces).

### Activation Phase:

- Check in with Volunteer/Staff Management Branch and sign the PEP Task Registration Form. Obtain identification.
- Report to assigned supervisor to obtain current status and specific instructions.
- Establish workspace.
- Determine resource needs, such as people, equipment, phones, checklist copies, and other reference documents. Notify Logistics of any resource requirements.
- Obtain equipment, supplies and required forms.
- Establish and maintain a position log to list the actions taken during the shift.
- Working in conjunction with the Registration Supervisor, establish several tables where this service can be delivered to evacuees.
- Review checklist with volunteers.
- In a "one-stop model" where Registration and Referrals are combined (e.g., one volunteer registers the family and provides referrals for their immediate needs such as lodging, meals etc.) do the following:

- Meet with the Registration Supervisor to discuss the supervision of the Registration and Referrals area.
- In a “two-stop model” where Registration and Referrals are provided separately (e.g., a registration worker registers an evacuee family, and sends the family to see a second worker to obtain Referral forms) do the following:
  - Meet with the Registration Supervisor to ensure that the Referrals area is located close to the Registration area, and discuss how evacuees will be processed from the Registration area to the Referrals area.
- Obtain the PEP Task Number for the event and post or distribute to volunteers.
- Make contact with Resource Acquisition Supervisor and request lists of food, clothing and lodging suppliers that volunteers can refer evacuees to.

### **Operational Phase:**

- Maintain communication with assigned supervisor.
- Maintain position log in chronological order describing actions taken during the shift.
- Acquire lists of available resources/suppliers for evacuees from the Resource Acquisition Supervisor and distribute to volunteers as required.
- Oversee volunteers as they interview evacuees to determine immediate needs (e.g., food, lodging etc.).
- Ensure that Referral forms filled out are completed correctly.
- Monitor resources/suppliers used and request additional lists of resources/suppliers from Resource Acquisition as required.
- Request authorization from the ESS Office at Headquarters (or ESS Branch Coordinator at the PREOC if activated) on reasonable but unusual requests by evacuees for services/goods.
- Ensure that completed Referral forms are forwarded to the Documentation Unit for processing as soon as possible.
- Reply to inquiries from suppliers about the ESS payment process.
- Attend briefings as requested.
- Brief workers within the Unit as needed.
- Prepare shift schedules as needed.
- Assist, support and provide direction to volunteers.
- Monitor Unit personnel to ensure appropriate worker care is implemented.
- Thoroughly brief replacement for the next shift before leaving workstation.

### **Deactivation Phase:**

- Complete all required forms, reports, and other documentation. All forms should be submitted to the Planning Section, as appropriate, prior to departure.
- Deactivate assigned position and close logs when authorized by the Reception Centre Manager.
- Submit a list to the supervisor, for delivery to the appropriate section, of the following:
  - Status of all borrowed equipment

- All ESS equipment and supplies needing restocking
- Names of personnel and hours worked
- Clean up work area before leaving.
- Sign out with Volunteer/Staff Management Branch.
- Leave a forwarding number.
- Access critical incident stress debriefing as needed.
- Be prepared to contribute to any post event processes (e.g., debriefs, reports etc.).

**Function Aids:**

- Position Log
- ESS Personnel Request Form
- Shift Schedule
- ESS Resource Request Form
- ESS Referral form
- ESS Referral Form Instruction Guide
- ESS Rates Sheet
- Invoice for Host Family (Billeting)
- ESS Referral Payment Process (refer to ESS Field Guide – Section 6 – ESS Expenditure Policy and Payment Process)
- Tracking Record of Resources