

Elements of an Effective Referral

Professionals should follow these best-practice guidelines when making referrals.



Written | Referrals should either be provided in writing or, if provided over the phone, followed up with the information below in writing.

Contain Pertinent Information | Referrals should contain the following information:

-  Name of the person/s being referred
-  Purpose of the referral
-  Person, organization, and contact information you are referring the parent to for professional services
-  Hours that services are available
-  A list of any information that the parent needs to bring with them to the appointment
-  Your name, organization, and contact information
-  Any required follow-up communication or reporting that is expected
-  Identify if a release of information (written informed consent) is included with the referral or will be sent separately

Crisis Intervention Services | A crisis intervention service is an emergency service when someone's health or safety is in dire jeopardy. An example would be a parent who is threatening suicide and has a plan and a means to carry out the plan. Professionals need to know at all times how and when it is appropriate to make a referral for a crisis intervention service. The process can vary from community to community and differs significantly from state to state.

Evaluate the Effectiveness of the Referral | Professionals need to check with both the parent and the referral source to see how well the referral worked. Did the professional feel this referral was a good match for their services? Did your parent feel that they received the services they expected? Was the parent treated with dignity by the referral source?

Coordination of Services | Professionals who are providing services to the same parent or family need to coordinate their services to avoid duplication and causing the family confusion. An effective practice is for both of the professionals and the parent to meet together to design the service plan. At the planning meeting, empower the parent to take a leadership role in defining what they need from each of the professionals, how they will measure if the service was effective, and what each person's role is in the service provision.

Professional Scope | Professionals need to be cautious to not operate outside their professional scope, which is determined by their position scope and responsibilities, not by their academic preparation or by previous work experiences.

Know and Understand What Resources are Available in Your Community Professionals have an ethical obligation to families to refer them to appropriate resources to assist in meeting their needs. It can be a daunting task to stay updated on the available resources in your community particularly in an urban setting. In a rural community, your biggest challenge is going to be locating needed services when they may not be readily available in your community. Many communities host a monthly or quarterly meeting to assist professionals with networking and learning about new resources. You may want to consider what your role might be in advocating for needed resources that are not currently available in your community.