Referrals

**POLICY/APPROACH:**

SOHS/EHS works collaboratively with all participating families to identify and continually access, either directly or through referrals, services and resources that are responsive to each family's interests and goals.

We follow-up with each family to determine whether the kind, quality, and timeliness of the services received through referrals met the families' expectations and circumstances.

Policy Council Approval 8/19/2014
Board Approval 8/21/2014

**HEAD START PROGRAM PERFORMANCE STANDARDS:**

1302.50(b)(3), 1302.52, 1302.53 Family and Community Engagement Program Services

**PROCEDURES:**

- A referral is a process that helps a client move on to another resource for service. The need for referral is established through contact with parents/guardians and other family members at home visits, conferences, and center contacts.

- There are six phases in a referral process:
  
  o When it is determined that a referral is needed, prepare the client for the process. Help the client understand why the referral is being made and the process with the referral agency. Reassure the client that you will follow along or be available as long as he or she feels the need to have your support.
  
  o Get E-11 release form signed so you can contact the referral agency/community partner (if needed).
  
  o Prepare the referral agency if needed - send completed and signed E-11 via fax or email. If possible, call ahead to the referral agency let intake workers know the client is coming or will be calling.
  
  o Facilitate (provide coaching, transporting, encouraging, supporting)
    • Problem-solve barriers to service with the client.
  
  o Record the referral in SHINE as a Need Identified case note or Goal.
  
  o Follow-up (with the client and with the agency)

- Keep your knowledge of the referral agency up-to-date. Make sure contact information and personnel names are correct.
- Follow up with the client within 30 days in order to track the timeliness, appropriateness, and the client's satisfaction of services.

- Continue to follow up every 30 days until services are received, are no longer needed, or family is no longer interested. At that point, enter a follow up note to explain the reason/result and close the case note.

- Follow up with the agency as appropriate, in order to increase opportunities for advocacy on behalf of the client(s), or to thank them for their assistance.