Elements of an Effective Referral

1. **Complete Client Name and Contact Info**

To reach the client in a timely way, the program receiving the referral needs to know the client's name and their current contact information.

BEST PRACTICES

> ➢ Provide 2 pieces of contact info (e.g., cell & email) in case one changes, or a data entry error invalidates one
> ➢ Note whether the contact information provided is for the client or someone who cares for the client (e.g., self vs. parent, guardian, adult child of a senior, etc.)
> ➢ Note whether the staff person can leave a message and/or text
> ➢ Note current services received and the status of the client record

Example 1: Dave Test at 978-888-7777 / dtest@gmail.com (self), no message, no text, client participating in Young Parents Program, did not complete full intake

Example 2: Testy Test at 978-888-7777 / dtest@gmail.com (contact is father, John Doe), ok to leave message, ok to text, client participating in Young Parents Program, completed full intake and pre-assessment on father

2. **Information Regarding the Nature of the Referral**

For the program receiving the referral to be able to engage with the client constructively from the start, they need to have a basic understanding of the services being sought and what needs led to the referral.

BEST PRACTICES

> ➢ ***Inform the client that you are making a referral for them*** and give them some specifics: program name, description of program, the name of someone from the program who might be contacting them, etc.
> ➢ In the referral, provide a quick summary of the client's needs.
> ➢ Also in the referral, make specific suggestions about what services the program receiving the referral might be able to provide to the client (pending an eligibility screening).

***IF YOU AREN'T SURE WHAT PROGRAM TO REFER TO OR HOW THEY CAN HELP:

- Review MOC's website for information about other programs available to your client: www.mocinc.org
- Review MOC's Referral Guide for a summary of our programs and to find the appropriate contact people at each program: https://www.mocinc.org/resourceguide
- Pick up the phone and call! Use the opportunity to learn more about another MOC program.

Example 1: John Doe needs after school care for his 8-year-old son, Johnny Doe. They live in Gardner. Participating in Young Parents Program. Father informed of the referral.

Example 2: Jane Doe is very sad following her divorce. She is interested in counseling. Not receiving other MOC services. Client informed of referral.
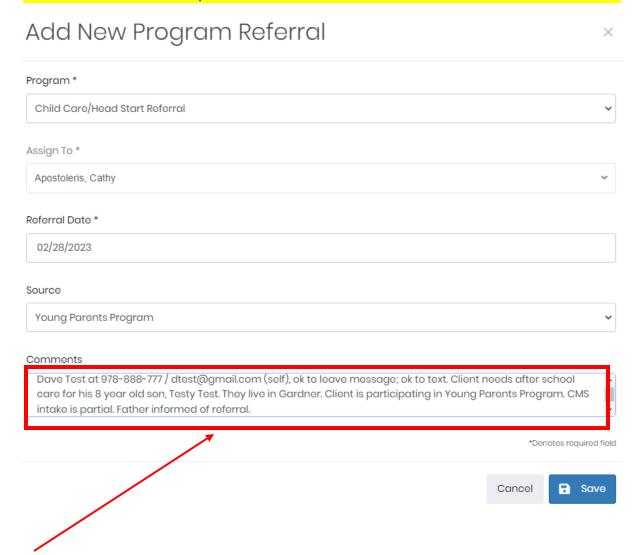

FULL COMMENT TEMPLATE

Client's Name at **contact info #1 / contact info #2 (self/other)**; **ok to text (yes/no)**; **ok to call (yes/no)**. **Client record status**. **Client needs <<<insert>>>**. **Client has <<<insert services to date>>>**. **Client has been informed of referral**.

Using CMS to Make an Effective Referral

MOC's current version of CMS supports effective referrals.

Add New Program Referral ✕

Program *

Child Care/Head Start Referral

Assign To *

Apostoleris, Cathy

Referral Date *

02/28/2023

Source

Young Parents Program

Comments

Dave Test at 978-888-777 / dtest@gmail.com (self), ok to leave message; ok to text. Client needs after school care for his 8 year old son, Testy Test. They live in Gardner. Client is participating in Young Parents Program. CMS intake is partial. Father informed of referral.

*Denotes required field

Cancel   💾 Save

The "Comments" you provide in your referral will show at the top of the Referral Management screen when the staff who receives the referral opens it in the CMS. This will allow them to contact and engage with the client quickly.

Dave Test
12/14/1994 (Age 28)
Agency ID: 28

Case Manager Cathy Apostoleris
Program Child Care/Head...
Current Location 60 Hicksville Rd

Summary
Client Details
Household
Evaluations
Programs & Referrals
Benefits Screening

Program   Referral Management

📝 Manage

Referred Program Child Care/Head Start Referral
Variant Standard
Referral Date 02/28/2023
Referral Deadline 03/07/2023
Owner Cathy Apostoleris
Referral Status Pending
Created By Cathy Apostoleris

Comments Dave Test at 978-888-777 / dtest@gmail.com (self), ok to leave message; ok to text. Client needs after school care for his 8 year old son, Testy Test. They live in Gardner. Client is participating in Young Parents Program. CMS intake is partial. Father informed of referral.