

Example #1

POLICY: Referral/Outreach

[INSERT PROGRAM NAME] accepts all referrals from agencies, organizations, and individuals and has established standards for the prompt handling of referrals. Referrals will be tracked and monitored, as appropriate, to maintain adequate documentation and ensure timely follow-up. Efforts to contact all referrals will be made in a timely and appropriate manner.

I. REFERRAL

When an individual or agency representative submits a referral form to [INSERT PROGRAM NAME] the name and contact information, for the person being referred (e.g., address or phone number), must be provided (note prior permission should be received). The referral will be accepted if the following two requirements are met.

a) The individual being referred is available to participate in [INSERT PROGRAM NAME] services.

b) Referral information indicates the individual may be eligible for [INSERT PROGRAM NAME] services.

Note: Referrals from institutions/agencies shall be accepted if they (the institution) are available to participate in the rehabilitation process and employment. Notification of a discharge date or discharge plan from the institution, which will allow for active participation by the individual is required.

II. PROCEDURE: Referral/Outreach

- Upon receipt of a referral provide information and an explanation of eligibility criteria and [INSERT PROGRAM NAME] to the person making the referral and the person being referred, as applicable
- Complete referral
- Document the reasonable efforts to contact and outcome of the referral in contact notes
- Maintain an ongoing documentation log of referrals for review by the manager
- Reasonable efforts to contact a referral should be made within 2 weeks of receipt of the referral by telephone, letter or personal visit. The purpose of the contact is to ascertain the individual's interest in applying for [INSERT PROGRAM NAME] services and to schedule the initial interview. Contacts should be made by the mode of communication best suited for the individual based on the available referral information. If there is a question about the referral's ability to fully understand written language, a phone contact or personal visit should be made. The referral source may also be a point of contact if attempts to reach the referral through other sources are unsuccessful.