

## **How to Refer**

When making referrals for clients, keep the following in mind:

**Why it is important to attend a referral appointment.** Be very clear with your clients as to why you are offering a particular referral. Let them know how this referral can be helpful to them.

**What to expect at the referral appointment.** Give your clients a clear idea of what is likely to occur at the referral appointment. How long will the visit take? Whom will they see? What kinds of questions will people ask of them?

**Relieve the client's anxiety.** Referrals can be anxiety-provoking. Take time to be reassuring.

**Write down the referral appointment date, time, address, phone number, and contact name.** Make sure your client takes this information to the appointment. If the clients will be making their own appointments, remind them to write down all this information.

**Discuss probable costs.** Let your clients know the cost estimates and billing procedures of the referral agency.

**Help the client prepare for the visit.** Explain to your client what papers/documentation s/he should take to the appointment. Also explain any special preparations s/he may need to make.

**Protect the client's confidentiality.** Only send your referral agency the information about your client that is germane to the problem and to the referral. Be sure you have your client's permission before sending any information to another agency.