

Referral Readiness Checklist

Prepare for a referral by confirming consent, the service requested, access needs, and next responsibilities.

USE WITH: Client and worker together

TIME: 10-15 minutes

ORIGINAL WORKSHEET

Facilitator note: A referral is not a guarantee of eligibility or service. Confirm current requirements and availability directly with the receiving program.

The support I am looking for

What do I want the program to help with?

Before making contact

- ☐ I agree to this referral or contact.
- ☐ The program appears to serve my area.
- ☐ We checked the current intake method.
- ☐ We know whether an appointment is required.
- ☐ We discussed language and accessibility needs.
- ☐ We know what information I consent to share.

Items to prepare

Notices, questions, documents, dates, confirmation numbers, or other items the program asked for:

Responsibility and follow-up

I will

The worker will

We will check the status

If the referral does not work
