

Definition and Documentation of Family Referrals

Head Start Performance Standards

§ 1302.50 (b) (3)

Policy

Head Start/Early Head Start (HS/EHS) staff make referrals to community resources and programs to help families meet identified needs. Before a referral is made, a family must either show evidence of need or request assistance or information about a specific matter or need. It is important for staff to actively listen to emerging needs during interactions with families as needs for information, referrals and resources may be expressed in various ways by families or individuals. They may emerge during discussions with families about housing, nutrition, health, children's developmental stages, transportation, medical or dental needs, the goal setting process or an emergency situation.

Family Services Teacher and Home Visitors directly assist in procuring or accessing information or assistance for individual families. Referrals must include follow-up with the family to determine the outcome and must be documented in ChildPlus in a timely manner.

Referral Criteria

It is sometimes difficult to distinguish when a family need counts as a complete referral according to Head Start Program Performance Standards or when it is only a casual interaction, conversation or exchange of ideas. For an action taken by any HS/EHS staff member to qualify as a referral, the following must apply:

1. The action must be specific to a family or individual.
2. The action must be specific as to topic.
3. Follow-up and documentation must take place.
4. The client must receive the benefit of the services.

When staff identify a potential need for a resource or referral which has not been directly requested by the family, they will offer to connect the family with the appropriate resource. For example, a teacher may notice that a child has no winter coat and may direct the family to an organization that distributes winter clothing.

When staff members distribute flyers to all families at their centers about an available service, but do not follow up with individual families, then no referral has taken place. However, if a family contacts Community Action staff for further information or help accessing the service described in the flyer, and if staff takes action and follows up with the family to determine if the service was received, then it is a complete referral and is documented in ChildPlus.

Referral Procedure

When families express or show evidence of having a particular need, staff will connect them to appropriate resources.

- Staff may provide families with resource information, or they may contact the organization on the family's behalf. For more information, refer to the **Community Resources Policy and Procedure**.
- The parent(s)/guardian(s) must sign a **Release of Information** to allow a staff member to discuss the family with another organization.

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- With the parent(s)/guardian(s) consent, staff members will take action to meet the identified need in a timely manner.
- If the family has increasing needs, several needs not easily remedied by resources or direct referral, is experiencing barriers accessing or receiving services or is currently in crisis, the family may benefit from additional support and follow up.
- The Teacher, Assistant Teacher and FST can collaborate on how to support the families' referral needs.

Remember that we will not always be involved in a family's life. Our goal is to empower each family to meet their family needs and locate appropriate resources. It is best to provide information about available resources rather than obtain those resources for them. However, each family is unique and may need varying levels of individualized support or may need more support initially.

Documentation Standards

Document notes and follow up entries in ChildPlus as soon as possible after the encounter but no later than 36 hours after the meeting.

To maintain consistency and objectivity throughout the record and throughout the program, see the **Documentation Standards** ChildPlus article to apply the appropriate documentation standards to all your updates.

- *Check back with the family within two or three days* after providing them with a resource to determine whether the family received services and whether those services were helpful.
- Document all referrals as appropriate in ChildPlus. Include details in the **Event Notes** field or in the **Action** section as appropriate.
- Document all follow-up actions as an **Action** within the same Event (Family Services, Health, Disabilities, and/or Mental Health.)
 - In the Family Services Information tab, enter information about the services received (PIR Section).

Some needs and referrals may appear to fit more than one category. Choose the category that most narrowly describes the referral. For example, a referral for English as a Second Language (ESL) class could be reported as 'adult education' or as 'ESL,' but ESL is the correct choice. Do not record the referral in both categories. Reference the **Update PIR Family Services Received** article in the ChildPlus portal, PIR section.