

Worksheet: Referral Management

1. Decide on collection process:
 - a. Folder on your computer
 - b. Section in your practice management system
 - c. Binder with tabs
 - d. Rolodex or index cards
 - e. Folder in your file cabinet
2. Organize into referral categories:
 - a. Individual therapists
 - b. Psychiatrists
 - c. Couple therapists
 - d. Primary care physicians
 - e. EMDR providers
 - f. Alternative medicine
 - g. Other
3. Collect name, title, phone number, address, and website for each referral provider.
4. Tracking process:
 - a. Keep track of each referral made to an outside provider, client name, date.
 - b. Follow up at next client visit re: referral
 - c. Note any problems, such as a discontinued phone number or closed practice.
5. Documentation:
 - a. Note referral in client record with name of provider, phone number, and reason for referral.
 - b. Note when client has connected with referral and note client experience.
 - c. Make note in chart re: client decision not to use referral.
6. Consent and confidentiality:
 - a. Be mindful to have written consent before transferring any information to referral provider.
7. Creating relationships:
 - a. When you receive a referral from another provider, consider sending an actual thank-you note with your business card.
 - b. Check in with client re: how they liked the provider.
 - c. Set up coffee date or zoom date with providers you use frequently.
 - d. Keep in touch.