



External Referrals and Direct Services **Instruction Sheet**



PURPOSE STATEMENT:

External Referrals and Direct Services document that families are being provided with resources that are responsive to their unique interests, needs, and goals. Follow-up documentation demonstrates whether referrals have met the family's expectations and needs.

A Direct Service occurs when Early Head Start/Head Start (EHS/HS) staff directly provides a family with a service. An example of a service is educational materials: a pamphlet on healthy snacks, a toilet training DVD, or tips on writing a resume or creating a budget.

An External Referral occurs when EHS/HS staff gives a family the contact information to a community agency or organization where the family can receive additional services, such as a dentist, food bank, or parenting classes. The family will need to take an additional step; such as call or visit the other agency.

TIMELINE:

External Referrals and Direct Services are documented throughout the entire program year. Follow-up on External Referrals occurs in a timely manner. Staff is encouraged to follow-up with families within 30 days.

STAFF RESPONSIBLE:

- Any staff member (including, but not limited to: Family Service Advocates, Home Visitors, Site Supervisors, Family Service Supervisors, Parent Engagement/Program Assistant, Teachers, and Comprehensive Services and Quality Improvement Program Support staff) who provide a family with a resource is responsible for documenting the External Referral or Direct Service in PROMIS.
- Any staff member who provides an External Referral to a community agency is responsible for following up with the family and documenting the follow-up in PROMIS and in the Progress Notes of the Child File.

INSTRUCTIONS:

When a family is provided with a resource, it is documented in PROMIS as either an "External Referral" or "Service" (See Record Keeping Standard Operating Policy and Procedure (SOP) for data entry directions). The PROMIS screen is then printed out and filed in Section 3 of the Child File.

After providing a family with an External Referral, staff follows up with the family in a timely manner to determine whether or not the referral has met the family's needs and expectations. Follow-up is documented in PROMIS (See Record Keeping SOP for data entry directions). The follow-up PROMIS screen is printed out and filed in Section 3 of the Child File, behind the original External Referral.