



BEST PRACTICES IN MAKING CLIENT REFERRALS

Holistic, client-centered care is integral to fostering health and well-being. The Fortune Society’s Reentry Education Project Online Service Directory is designed to help clients and providers access a wide range of resources to create individualized systems of care. Supportive care and referrals are built on trusting relationships between clients and providers. This guide can help you facilitate collaborative conversations with your clients and support clients along their path of wellness.

BUILDING TRUST

CORE VALUE		
<i>Building safety and trust is our number one priority when working with clients.</i>		
STRATEGIES		EXAMPLES
Ask every client what you can do to help them be more comfortable during the appointment.	1	How can I help make our time together as comfortable as possible for you?
Use sensitive person-first language.	2	Person with a history of incarceration / Person living with HIV / Person who injects drugs.
Ask open ended questions.	3	How would you like to use our time together today?
Acknowledge and validate clients’ feelings.	4	It sounds like you feel frustrated that your symptoms have not improved.
Acknowledge strengths and progress.	5	It sounds like you did the best you could to take care of yourself while incarcerated.
Talk to your clients about what you are going to do during the appointment and why. Then ask for consent before taking each action.	6	I would like to put a stethoscope on your chest to listen for any irregularities in your heart beat, I do this for all of my patients. May I put a stethoscope on your chest?
Be transparent about your own agenda, limitations, and time constraints.	7	We have about fifteen minutes today for your appointment. I would like to do a basic exam, answer any questions, and make any relevant referrals during our time together.
Offer use of your space and resources.	8	I have a phone charger you are welcome to use.

IDENTIFYING NEEDS AND SETTING PRIORITIES

CORE VALUE	
<i>Clients are the experts on their own experiences and needs.</i>	
STRATEGIES	EXAMPLES
Clients and providers can collaboratively work to identify the clients' unique set of needs.	1 What are your goals? What resources would benefit you?
Focus on basic needs.	2 How would you describe your living situation and access to regular meals?
Offer choices.	3 It sounds like you may benefit from access to a consistent place to sleep and an ID card. Which one would you like to discuss first? How would you feel about looking at potential resources with me?
Build on strengths and collaboratively set goals.	4 It sounds like you have done a great job trying to find work since coming home. What would you like to accomplish in the next few months?
Acknowledge that getting one's needs met is a process.	5 You did an amazing job by coming in today and getting started on this process.

PREPARING FOR THE REFERRAL

CORE VALUE	
<i>Supportive referrals look different for every client.</i>	
STRATEGIES	EXAMPLES
Offer choices to your client about how they would like to get a hold of the service location.	1 How would you feel about calling this organization together right now, or would you prefer you take down their contact information?
Ask if the client would like to make a checklist of materials they need to bring with them.	2 Would it be useful to make a checklist together of things you will need to bring to your appointment?
Ask the client if they need directions.	3 Would you like me to print out directions for you?
If your client has a phone, encourage them to take pictures of everything.	4 Many of my clients like to take pictures of the checklist and directions so that the day of the appointment they have everything with them. How does this sound?