Operations Manual

Governed By: Operations	**Effective Date:** 6/18/2014
Procedure: Internal Referral Procedure	**Updated Last:** 2/23/2015
Purpose: To provide instruction for any referrals provided to customers within CEO agency programs	

Summary:

Each Program at CEO is responsible for the support in providing customers with knowledge and any applicable resources to help meet their needs or goals, including programs within the agency. Each referral provided within the agency must be tracked (See *CAP60-P4-Referral Tracking*), but also communicated as outlined below.

For Each Program Referral Provided:

For each program staff that refer a customer to CEO programs and resources that may be of interest/support for the customer, the program staff should provide the customer with the option of either the program, or the customer, initiating contact.

If a customer states that they do not wish the program to which they are referred to complete follow up, the referral should be entered into computer database. When program engages with customer in any subsequent interaction appropriate follow up should occur inquiring about follow through with referral provided and documenting.

If a customer would like the program to initiate contact, then the CEO program referring should receive written consent from the customer to release information to the program of interest. Once consent is completed the program staff providing the referral should email (if using CAP60, please see *CAP60-P5-Referral Emailing*) the following information to the specific program proxy email address as outlined on the proxy email address:

- Customer Name
- Best Phone Number to be reached at during business hours
- Best Days/Times to be reached
- Brief Description of the reason for referral

For Each Program in Receipt of Referral:

Each assigned program proxy email staff (as outlined in proxy email inbox spreadsheet) should be checking the program proxy email on a regular and consistent basis. When a referral is received the program staff assigned to complete follow up should do so in a timely manner, or in the timeline outlined in specific Program Operation Manual.

A minimum of three attempts should be made, and documented, to reach customer who requested contact. If unable to reach, the staff providing referral follow up should inform the program who completed referral that contact was unable to be made for future follow up.

If contact is made, the program staff who completed should notify the referral source, and continue in outlined services as outlined between customer and program.