

Referral script:

Practice until it flows well for you.

Red - what you can say

Black - describing the process

Up-to-3 Referral Script

Introduction:

- If Parent is calling in to refer their child

“Up-to-3 Early Intervention this is ____”

- Parent explains that want to get their child evaluated by Up to 3.

“So if I understand you correctly, you are wanting to get your child referred to our program to get him/her evaluated? Yeah, I can definitely help you out with that. How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just lets us know where he/she is at so we can be more prepared for the evaluations. The referral process takes about 10-15 minutes over the phone, is now a good time to do this?”

- If parent calls Miriam (who already explains the process) and she transfers to you:
 - “Up-to-3 Early Intervention this is ____ I understand you are wanting to refer your child?”
 - Start referral process
- If you’re calling back parents who left message wanting to refer their child
 - “Hey this is ____ from Up-to-3 Early Intervention. Am I speaking to ____? Great! I am just giving you a call back because I see that you left a message wanting to refer your child to our program, is that correct? Awesome!
 - “How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just lets us know where he/she is at so we can be more prepared for the evaluations. The referral process takes about 10-15 minutes over the phone, is now a good time to do this?”
- If you’re calling a parent who has been referred to us by DCFS
 - “Hey this is ____ from Up-to-3 Early Intervention. Am I speaking to ____? Great! I am giving you a call because our program received a referral from DCFS (Division of Child and Family Services) for _____. The reason that DCFS will

send our program referrals like this is because our program works with kids with developmental delays or disabilities of various kinds. We provide services like speech therapy, physical therapy, occupational therapy etc. among other services to help out with various needs and we are wondering if you would be interested in having us evaluate your child?"

- If parents are interested
 - "How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just lets us know where he/she is at so we can be more prepared for the evaluations. The referral process takes about 10-15 minutes over the phone, is now a good time to do this?"
- If you're calling a parent who has been referred to us by a hospital
 - "Hey this is ___ from Up-to-3 Early Intervention. Am I speaking to ___? Great! I am giving you a call because our program received a referral from ___ hospital for _____. The reason that hospitals will send our program referrals like this is because our program works with kids with developmental delays or disabilities of various kinds. We provide services like speech therapy, physical therapy, occupational therapy etc. among other services to help out with various needs and we are wondering if you would be interested in having us evaluate your child?"
 - If parents are interested
 - "How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just lets us know where he/she is at so we can be more prepared for the evaluations. The referral process takes about 10-15 minutes over the phone, is now a good time to do this?"
 - If you're calling a parent who has been referred to us by a doctor's office
 - "Hey this is ___ from Up-to-3 Early Intervention. Am I speaking to ___? Great! I am giving you a call because our program received a referral from doctor _____ office. The reason that doctor's offices will send our program referrals like this is because our program works with kids with developmental delays or disabilities of various kinds. We provide services like speech therapy, physical therapy, occupational therapy etc. among other services to help out with various needs and we are wondering if you would be interested in having us evaluate your child?"
 - If parents are interested
 - "How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just lets us know where he/she is at so we can be more prepared for the evaluations. The referral process takes about 10-15 minutes over the phone, is now a good time to do this?"

The Referral Process:

- What is your child's name? How do you spell that?

- Repeat name and spelling back to parent for verification
- **if you aren't sure if it's a boy or a girl** Is this your son or daughter? _____
- What is your child's birthdate? _____
- Repeat birthdate back to parent for verification
- Were they born premature? If so, by how many weeks? _____
- What is your name (mom or dad's name)? How do you spell that?

- Repeat name and spelling back to parent for verification
- What is your address? Is there an apartment number with this address?
_____ apt # _____
- Repeat address back to parent for verification
- What is the best number to reach you at? _____
- Repeat number back to them
- Is there a good email address we can list for you? How do you spell that?

- Parents can decline to list an email address
- Repeat email address back to parent
- Do you want to list the father (or mother) as a contact as well? If so, what is his or her name and number? Name and number _____
- Repeat name and phone number back to parent for verification
- How did you hear about our program?
- Who is your child's primary care physician or pediatrician?
- Does your child have Medicaid or CHIP? # _____
- I can either get that number from you now, or you can give it to us later on in the evaluation process?
- If they choose to give it to you during the referral, repeat it back to them for verification
- What is the primary language spoken in the home? _____
- What is your child's race and ethnicity? Circle one

Two or more races

American Indian or Alaska Native

Asian

Black or African American

Native Hawaiian or Other Pacific Islander

White

- If parent just says “white” or another race, please ask them “Is your child’s ethnicity Hispanic or Non-Hispanic?”
- What are concerns about your child’s development?

- Repeat concerns back to parent afterwards
- Are there any more concerns about your child’s development?

- What is the best time to contact you? _____

What is the best time to do an evaluation? _____

Are there times like nap time, or picking up other children that we would want to avoid?

- The last part of the referral process is to fill out the questionnaire. Would you give me second while I go get, so we can finish up with that?
- On this questionnaire the answers are yes, sometimes, or not yet so just answer to the best of your abilities on each one.

** Fill out ASQ**

- ***If an ASQ-SE needs to be filled out as well*** There is another questionnaire that deals more with behavior that we would want to fill out as well since there are concerns in those areas. Is it alright if we fill that out as well over the phone? On this questionnaire the answers are most of the time, sometimes, or rarely or never. Additionally, if you are specifically concerned with a behavior listed in the question please let me know as well.

** Fill out ASQ-SE**

Referral Conclusion

- “That should be all the information that we need to get your child referred. Let me explain how the rest of the process works. Tuesdays are when staff review these new referrals after which you will get a call by the following Friday to schedule your evaluations. There is a nurse who will do a health evaluation on your child. There is also an evaluation where they will test all areas of development which we will schedule here in a second once I am done explaining the process. If they need to do any more specific testing, such as a speech or a gross motor evaluation they will call and schedule these additional evaluations with you.”
- Let me pull up the evaluators schedule, so that I we can schedule a time with you. You said you were most available on _____ correct?
- Okay, would _____ work for you? Great! I will schedule you for _____ with _____ (evaluator). Let me go ahead and give you the evaluators number just in case there is a problem with your evaluation appointment and you need to reschedule. Their number is _____.
- All evaluations will be done in your home. The one that we have scheduled on the _____ is the overall developmental evaluation. You will be getting a call to schedule the rest of the evaluations no later than Friday ***or next Friday if done after Tuesday***.
- ****If you aren't scheduling a BDI for them since they are 12 months or younger or evaluator isn't ready to do solo visits****
 - “That should be all the information that we need to get your child referred. Let me explain how the rest of the process works. There is nurse who will do a health evaluation on your child. There is also an evaluation where they will test all areas of development. If they need to do any more specific testing, such as a speech or gross motor eval they will also schedule these evaluations with you. Tuesdays are when staff review these new referrals and schedule their visits. Your service coordinator will contact you by the following Friday to schedule the evaluation appointment with you. The service coordinator is kind of like a case manager for your child and is responsible for coordinating the different services that we offer.
- After they have finished doing all the evaluations, your team will review all the results with you. They will create an individualized service plan for your child with you.
- As far as the pricing is concerned, there is no charge for the evaluations. If your child is eligible for our program then the monthly cost of our services depends on family income and family size. If your child has Medicaid or CHIP these actually cover the entire cost of our services. Your service coordinator will review all this information with your if your child is eligible though. Do you have any questions for me? Thank you so much for your time and have a great day!