



Standardizing Referral Processes and Documentation: *Strategies, Ideas, and Resources for Community Health Centers*

Overview

During a learning network session on standardizing referral processes and documentation, community health centers shared best practices for improving referral workflows, communication with families, and identifying new referral partners while strengthening existing collaboration. Health centers can use key referral data metrics, collective team input, and family feedback to find improvement opportunities in the process to enhance patient and referral outcomes for delivery of high-quality health care.

Practical Strategies

- **Prioritize communication with families and honor patient preference.** Families can face many challenges when receiving a developmental diagnosis. When health centers transparently communicate what to expect with the referral process, it can help patients access care more effectively and support referral completion. Engage health center team members, such as patient navigators, to inquire about and document family needs and care preferences in the electronic health record (EHR). Having dedicated staff in this type of role can also support coordination with referral partners and further improve referral completion and family satisfaction.
 - **Standardize your referral workflow and foster positive reinforcement among the team.** Having a practice-standardized referral workflow will help the care team capture and record necessary patient data and reduce gaps in care. Conduct regular trainings with the full health center team to promote buy-in and reinforce the importance of each role in the workflow in supporting improved patient outcomes.
 - **Build strong collaborative relationships with referral partners.** Every community partner has their own unique roles and processes. Start small and work with your top referral partners to understand and identify referral pain points that can be addressed. Some common challenges you might address together include data sharing, bi-directional communication, and referral follow-up to ascertain family outcomes and if needs were met.
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- **Use EHR system capabilities to track early childhood development (ECD) referral data.** Utilize ECD referral data to identify milestones specific to children ages 0-5 and improvement opportunities such as referral follow-up, family challenges, and missed communication. Work with your EHR lead(s) to create ECD practice-standardized data entry and reporting processes. Regular training for staff on these processes will assist with referral coordination.

Actionable Ideas

- **Integrate family feedback into referral workflow.** Create opportunities for families to share input and feedback when developing or improving workflows. This helps strengthen family-centered care and ECD referral outcomes by identifying and co-developing improvements in communication and referral follow-up strategies.
 - **Use a multidisciplinary quality improvement team to recommend referral workflow improvements.** Engage team members that are both directly and indirectly involved in the referral workflow to identify and address gaps and challenges. This approach breaks down communication silos and reinforces that standardized workflows should be implemented consistently among the health center team.
 - **Develop a referral partner communication and outreach plan.** Establish partnerships with community agencies to create a mutual family outreach and communication plan that advances shared goals. Host regular connection points to provide opportunities for information sharing and engagement across programs and partners.
 - **Actively monitor and track referral data to identify and address challenges.** Utilize key ECD data metrics (e.g., referral completion rates, wait times, patient satisfaction) to highlight successful patient outcomes and ensure proactive follow-up for access to developmental health services. Incorporate family feedback on this data to provide key insights into your health centers' care coordination effectiveness.
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Resources

- [Getting Started Guide: Implementing a Screen Process – Early Childhood Developmental Health Systems: Evidence to Impact Center](#)
- [Sample Release and Share Information Letter](#)
- [Early Intervention Feedback Form to the Medical Home](#)

If you have questions, please email us at ECDHSCenter@zerotothree.org.



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