

Family Resource Referral Sheet

For professionals working with families. Use this sheet to explain a resource and agree on what happens next. Follow your organization's recordkeeping and privacy procedures. Do not send completed family information to NPF.

Begin with the family's priority

What the caregiver wants help with, in their own words:

What kind of support they would like to consider:

What they do not want shared:

Discuss whether the person wants information only, help making contact or another agreed action. Do not assume consent to a referral or information transfer.

Identify the provider

Organization and service name:

Official website:

Contact information:

Geographic area served:

Who the service is for:

What the service provides:

What it does not provide:

Check practical details

Separate confirmed information from questions still to ask. For example, if a website lists a service but gives no current availability, record availability as unconfirmed. Include the date and source of each check.

Item	Information verified with the provider	Question still to ask
Eligibility or referral requirement		
Current availability		
Fees, insurance or assistance		
Hours and location		
Language or interpretation		
Disability or communication access		
Required documents and secure submission		

Date checked:

Source or person confirming the information:

Explain the relationship

Describe the service as an independent provider unless an actual formal relationship applies. Confirm eligibility, availability and staff qualifications directly with the provider.

How I explained why this resource may fit:

Questions that still need an answer:

Agree on information sharing

Does the caregiver want contact assistance? Who will make the contact? What information may be shared and for what purpose?

Where permission is recorded:

Use the permission process required by your organization and the type of information. This worksheet is not itself a legal consent form.

Confirm the next step

Record only actions that have been agreed. If you have not spoken with the receiving provider, leave its commitment blank and note who will contact it.

The family will:

The practitioner will:

The receiving provider has agreed to:

When and how to check progress:

Alternative route if this one is unavailable:

Close the conversation

Check that you explained the next step clearly by asking the caregiver to describe their understanding. Provide a copy of the useful provider details in a format they can use.

For an urgent safety or health issue, follow your organization's emergency procedures.

Completed example: information without a data transfer

This fictional practice example does not name a real provider, confirm availability or describe an NPF partnership.

Caregiver's priority: Find care that fits an evening work shift.

Kind of help requested: Official search information. The caregiver wants to make the first contacts themselves.

Provider: Example Community Resource Desk, an invented information service for this exercise. In actual use, enter a verified organization and official contact details.

Confirmed for this exercise: The desk explains how to search local programs. It does not offer child care or decide financial assistance eligibility.

Unconfirmed: Any program's opening, evening hours, fees or ability to meet the child's care needs.

Information sharing: The practitioner provides public contact information. No child's record or caregiver's personal details are sent to another organization.

Agreed action: The caregiver contacts the service about search routes. The practitioner offers to discuss unanswered questions at an agreed follow-up.

Receiving provider's commitment: None recorded; it has not been contacted.

When a referral involves more than a link

If the caregiver requests help making contact, name the task precisely. Finding a telephone number, making a call together and sending a record are different actions. Explain the information each action would involve and use the permission procedure that applies to your role.

Do not mark the referral as completed merely because details were sent. Follow your organization's process to distinguish a contact attempt, an acknowledged referral, an appointment and an accepted service. Ask the caregiver whether follow-up is wanted, and agree on its purpose.

Action the caregiver has requested:

Information needed for that action:

Permission process to follow:

What remains unconfirmed:

If an option is unavailable, return to the family's stated priority. Another list of unrelated services can create more work without addressing the need.

Related resources

[Read Community Connections](#) · [Save this sheet as text](#)

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