

PROFESSIONAL RESOURCE KIT

Referral and Follow-up

Use these resources to help a family look for support, ask a provider specific questions and keep track of what has been confirmed. They are planning aids; they do not establish eligibility or acceptance into a service.

In this kit

1. [Asking for community support](#)
2. [Questions to Ask a Support Provider](#)
3. [Family Resource Referral Sheet](#)

Using the materials

Choose the pages that fit your conversation. Keep blank worksheets for individual use, and distinguish fictional practice examples from a family's own circumstances. Families do not need to return completed worksheets to NPF.

[View NPF professional resource kits](#) · [Reuse and permissions](#)

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Asking for community support

[Read Asking for community support online](#)

Contacting a service can involve unfamiliar terms, repeated questions and uncertainty about whether you have reached the right place. A short preparation note can help you keep the purpose of the call clear.

You do not have to explain every part of your family's circumstances at the first contact. Begin with what the organization needs to determine whether it can help.

Describe the need in one sentence

Try a practical description: “I need child care during these hours,” “I want to ask about help with my child's development,” or “I am looking for someone to talk to after giving birth.”

A service may use a term you do not recognize. Ask the person to explain it and whether it matches what you are looking for. A program name is not always a clear description of what it does.

Check that you have reached the provider

Use the organization's official website or a reliable public directory. Confirm the name and purpose of the service before providing detailed information. If you are referred elsewhere, ask for the full organization name and official contact route.

Our [support directory](#) links to providers' official websites. Contact the provider directly to ask about services or apply.

Ask the practical questions early

Find out whom the service supports, what area it covers, whether a referral is required and what it costs. Ask whether places or appointments are available and what happens if there is a waiting list.

Mention interpretation, communication, disability access, transportation or scheduling needs. Knowing about these needs early can help the provider explain whether and how it can accommodate them.

For example, [ChildCare.gov](#) provides routes to state and territory information. The responsible agency or program still needs to explain local requirements and options.

Share personal information carefully

Ask why a document or detail is required, who will receive it and how to send it securely. Do not post identity documents, a child's records or financial details in public comments or an unverified message thread.

If a professional is making a referral for you, ask what information will be shared and how to give or limit your permission.

Confirm what happens next

Before ending the conversation, repeat your understanding. “I need to complete this form, then your office will review it. When should I check back?” Write down the date, the person's name or role and the next contact method.

Distinguish an inquiry, an application and an accepted place. A confirmation that information was received may not mean eligibility has been determined.

If the answer is no

Ask whether the service knows another appropriate provider, whether circumstances could change eligibility or whether there is an official review process for a decision. Rules differ by program; get the explanation from the responsible organization.

Keep a simple record so you do not have to reconstruct every conversation. You can ask a trusted person to help organize calls, while deciding which information you want them to share.

If the need becomes urgent

Use the relevant urgent service rather than waiting for an application or routine callback. U.S. crisis and maternal mental health contacts are on [Find Support](#).

An example of a first call

The following conversation is fictional. It shows how to clarify a service; it does not describe a real provider or confirm eligibility.

Caregiver: “I need help finding child care that covers an evening shift. Does your service help with that search?”

Service: “We provide information about local programs, but we do not offer care ourselves.”

Caregiver: “Can you help me find programs with those hours and explain where to check their licensing information? I also need to understand whether cost assistance might apply.”

Service: “For assistance, you need to contact the responsible agency.”

Caregiver: “What is the agency's full name and official contact route? What should I ask at the first contact?”

The caregiver can record that one organization provides search information and another makes assistance decisions. Neither conversation confirms an available place. Keeping the roles clear can prevent repeating the same call to a service that cannot make the decision.

Keep a record that distinguishes progress from uncertainty

What happened	What it means	Next question
A service sent a program list	You have possible contacts.	Which programs have the needed hours and openings?
An agency received an application	The application reached the agency.	Is anything missing, and when can you expect a decision?
A provider offered an appointment	You have a proposed time.	Is it confirmed, what does it cost and what must you bring?

Use only the details relevant to your situation. Keep the record somewhere you choose, and avoid including private documents in a broadly shared note.

When a call ends without an answer

Ask one clear follow-up: “Who is responsible for answering this question?” If the person is referring you elsewhere, request the official contact information and the reason for the referral. If you are on a waiting list, ask what help is available while waiting.

When a deadline matters, explain it early. A work start date or an appointment tomorrow changes the question you need answered; it does not guarantee priority or acceptance. Ask the provider which alternatives it can actually identify.

Related resources

[Use the provider question sheet](#)

Questions to Ask a Support Provider

[Read Questions to Ask a Support Provider online](#)

Use this sheet when contacting a support service. Before the conversation, mark the questions you most need answered. During the conversation, record what the provider confirms and note anything you still need to check. You can leave out questions that do not apply to the service.

Organization:

Official website or contact information:

Date of conversation:

Name or role of the person you spoke with:

Start with the service

- What help does this service provide?
- Who is it intended for, including ages and service area?
- What does it not provide?
- Do I need a referral or assessment before I can take part?

Notes:

Ask about the people involved

- Who would work with me or my child?
- What is their role and what qualifications apply?
- How can I check a relevant professional credential?
- Who should I contact with a question or concern about the service?

Notes:

Understand cost and commitment

- What fees or other costs should I expect?
- Does the service accept insurance or public assistance? Are other payment options available?
- Are there deposits, missed-appointment charges or cancellation rules?
- What would I be agreeing to, and can I read that information first?

Notes:

Ask about access and availability

- Are appointments or places available?
- What happens if there is a waiting list?
- What hours and locations are offered?
- Is interpretation or another communication format available?
- How are disability access needs handled?
- Is a remote option available, if relevant?

Notes:

Ask about information and privacy

- What information or documents do you need, and why?
- Who can access them?
- How should I send sensitive material securely?
- What permission is needed before information is shared with another provider?

Notes:

Leave with a clear next step

What I will do:

What the provider will do:

Any documents needed:

When and how to check back:

What to do if the service cannot help:

Keep a brief record

An inquiry, an application and acceptance into a service are different steps. Note which step you have reached. Do not send this completed sheet to NPF or place personal details in a public message.

Start with three questions

If you have only a short call, begin with these:

1. Does this service address the need I have described?
2. Can I use it, considering my location, circumstances and the current availability?
3. What would I need to do next, and what would it cost?

Then choose the questions relevant to the answer. An education group does not need every question intended for a clinical service. A child care inquiry needs the program's applicable oversight and care policies as well as hours and fees. A professional assessment requires a clear explanation of who provides it and what follow-up involves.

For a discussion group: ask about the focus, facilitator, format and what participants are expected to share. **For a class:** ask who it is for, what is taught, materials, fees and attendance commitments. **For individual support:** clarify the provider's role, assessment process where relevant and follow-up. These are selection prompts for independent services, not descriptions of NPF offerings.

Completed example: an information service

This example is fictional. It demonstrates note-taking, not an endorsement or an actual referral.

Need: Information about child care options for a variable work schedule.

Confirmed: The service provides information about local programs; it does not operate a child care setting or guarantee a place.

Still to ask: Which suggested programs have the hours needed, current openings and suitable care arrangements?

Caregiver's next step: Contact two programs using their official details and arrange visits if possible.

Service's agreed step: Send its public search information. No private child records are being transferred.

Cost or commitment: No enrollment agreement has been made. Each program's fees and terms need to be checked separately.

Record the answer in the provider's terms

If the person says “call next week,” ask when and through which route. If they say “usually covered,” ask who confirms coverage for you. Keep the uncertainty in the note until the responsible organization answers it.

Question not yet answered:

Person or agency responsible:

How and when I will ask:

You do not need to complete every question before taking an appropriate next step. You do need the important details for the decision you are making.

Related resources

[Read Choosing Support for Your Family](#) · [Save the question sheet as text](#)

Edition: October 2026. National Parenting Foundation. See [reuse and permissions](#).

Family Resource Referral Sheet

[Read Family Resource Referral Sheet online](#)

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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