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COLLABORATIVE DEFENSE TOOLKIT

# Referral Form

Asking the right questions is a crucial element to internal efficiency for defense providers. While attorneys often have minimal time to conduct thorough issue-spotting of their new clients, a concise screening of basic needs that can be easily communicated to support staff pave the road for seamless service delivery. By utilizing an internal referral process, defense agencies can create a workflow that clearly and effectively transmits necessary client information to all relevant staff members. The streamlining of this process ensures that staff are properly notified of client needs and allows for a centralized place for all staff to easily review progress in service delivery, external referrals, and other case management needs.

## Identifying Client Priorities

Upon completion of the initial client interview, attorneys should assess the most urgent needs that can be addressed by support staff members. These can typically be expressed by the client during an intake, where they may share difficulties they are facing beyond their criminal case. Following this interaction, attorneys should clearly document these priorities on a referral form that will then be sent to support staff. This creates a starting point from which the support staff can identify client goals and begin connecting the client with community providers to address these priorities. As attorneys continue to work with clients and the demands of their criminal case evolve, more service goals can be identified and referred to support staff to address.

## Completing the Referral Form

Many clients will demonstrate need in a variety of areas that are mentioned on the referral form. In order to best assist non-attorney staff in prioritizing support, attorneys should concisely describe the services needed, case requirements to be met, and any important information that would inhibit access to services (e.g. client wants to apply for public benefits but does not have a birth certificate). Highlighting details for support staff increases efficiency of service delivery and helps determine initial steps for case management.

## Setting A Realistic Expectations

When submitting a request for client services, attorneys should reach out to support staff far enough in advance that the staff can respond and address the client needs before any pending court appearances. important deadlines should be clearly communicated to support staff to avoid any ramifications to the client or any internal mishaps. Additionally, in order to prioritize service provision, attorneys should highlight the most pressing issues their clients are facing. Ideally, all client service goals will be addressed; however, extrapolating the most urgent needs allows support staff to best target the urgent service goals of their entire caseload, particularly when determinative to criminal case outcomes.

### Making It Your Own

Referral forms and processes are only as effective as the service provision that follows. When designing and implementing these tools, defense agencies should ensure that all referrals are made for needs that can be addressed by support staff. For example, if the office does not conduct mitigation, it should not be listed as a referral option. Each office should select the method of communication that is most efficient from attorneys to non-attorney staff and can adapt this tool to a format that best suits their communication needs.