Creating and supporting strong referral partnerships and streamlined referral processes between agencies are key components to providing comprehensive care and case management to urban American Indian and Alaska Native women. State approved Inter-Agency Referral Forms may be helpful resources to support referral relationships between partner agencies and assist patients with their referral appointments.

**INGREDIENTS:**

- Partnering agencies
- Workgroup to develop screening information form

**PREPARATION:**

Step 1: Partnering agencies (e.g. state Breast and Cervical Cancer Early Detection Program (BCCEDP), UIHO, community health clinics) should form a workgroup to meet to discuss the development of the Inter-Agency Referral Form.

Workgroup meetings are an opportunity to:

- Ensure buy-in from all groups
- Ensure all partners are familiar with state BCCEDP eligibility criteria
- Ensure all partners are familiar with eligibility criteria specific to partner agencies. Share information on eligibility criteria (if they differ between agencies)
- Discuss referral successes, challenges, and identify areas where improvements are needed to support successful referral connections

Step 2: Using information from Step 1, the workgroup should draft the Inter-Agency Referral Form (check out the WEAVING Project form template for ideas). During this time, the proposed referral process should also be developed and documented. State BCCEDP representatives should provide oversight to ensure the form reflects state eligibility requirements and complies with state regulations and approval processes.

**OUTCOMES:**

Inter-Agency Referral Forms can assist communication between agencies, streamline intake processes, facilitate reimbursement processes and support case management efforts. Clients have a form to help them better understand services that they are eligible for, which may encourage and facilitate successful completion of a referral appointment.

**TIPS:**

- Be sure that your form includes the name and contact information of the agency that is making the referral in case there are questions or additional information is needed.
- Include space where the location, date and time of the referral appointment can be noted to help serve as a reminder for the patient of the upcoming appointment.

**BE SURE TO CHECK OUT THE WEAVING PROJECT WEBSITE FOR A TEMPLATE YOU CAN USE TO MAKE YOUR OWN INTER-AGENCY REFERRAL FORM!**
Step 3: Share draft form with leads at partnering referral agencies. If possible, bring partners to an in-person meeting to discuss the referral process and the new form(s).

Step 4: Once finalized, share document with partnering agencies. Conduct meetings and brief trainings with agency staff to discuss the new referral forms and process.

Step 5: Make sure instructions on how to use the screening information form are included in new employee orientation materials at participating agencies. This will help ensure that new employees hired in the future are aware of the form and process. Also consider doing quick refresher trainings during staff in-service or meetings.

Tip:
- Be sure that your form includes a component that verifies the woman’s eligibility for services (this may be a signature line from an authorized administrator at the agency, with date of enrollment).

Sharing the Results:

If a patient is newly enrolled or currently enrolled in the state BCCEDP and is being referred to another agency for services, provide the patient with the Inter-Agency referral form. For each patient referred, make a copy of the form for their medical record and if appropriate, fax a copy to the referral agency. Check in regularly with partnering agencies to determine if the Inter-Agency Referral Form is working or if improvements can be made.

Keys to Success:
- Leadership role of state NBCCEDP in developing the Inter-Agency Referral Form and coordinating partner input.
- All agency partners have input in the development of the Inter-Agency Referral Form.
- All agency partners are aware of the Inter-Agency Referral Form and understand how to use it.
- There is a centralized contact person at the state that partner agencies can contact with any questions.

Special thanks to Diane Arave, Montana Cancer Screening Program, for sharing information about the program’s screening voucher.