

## Navigator's Referral Worksheet

The first step of a good referral is to recognize situations where a family may need help that goes beyond your level of expertise!

Our "Wisconsin Coverage Connections™" Referral Worksheet can help!

Complete these brief questions with the family, then give ABC for Health or ABC for Rural Health a call for more assistance! *Contact information is on the other side.*

A proper referral starts with a good conversation with a family:

Main family contact (*Name*): \_\_\_\_\_

Best phone number (*Home/Cell*): \_\_\_\_\_

Best time to call: \_\_\_\_\_

Contact information (*Address*)

Family size: \_\_\_\_\_

Names and ages of family members:

- 1.
- 2.
- 3.
- 4.

What is the family's current health coverage, conditions or needs?

What are the challenges the family faces obtaining coverage and services?

What other questions do they have?



## Referral Worksheet (continued)

Are any family members employed? Yes / No

*Please indicate who is working, and if insurance is offered through the job*

Family income: \_\_\_\_\_ (Monthly or Yearly)

Is this income determined using MAGI rules? Yes/No

- *Sources of income?*
- *Allowable deductions?*
- *Self employment?*

Medical conditions:

*Do family members have medical or special health care needs?*

*Do any of the children have special health care needs?*

Immigration status:

*Status may be different for each family member! Be sure to ask about each person.*

Let the family know you'd like to direct them to more detailed assistance

- Don't just give them a phone number... do a "warm hand-off"
  - Do a 3-way call where you call with the family, **OR**
  - Call ahead to alert the agency a family will be calling

### Contact Information

ABC for Health: 1-800-585-4222

ABC for Rural Health: 715-485-8525

Advocacy & Benefits Counseling For Health

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