

COMMON ERRORS ON THE NEW REFERRAL AND INQUIRY FORM

1. The form and all forms must always be **written in ink**.
2. Clients need to **call in to the agency themselves** (unless the client is a child, mentally retarded, or a frail elderly person, or if the person cannot speak English and needs an interpreter). If they can't call themselves then the problem is an emergency and we are not dealing with emergencies on this sheet.
3. **Write in an abbreviated style**. "Client called today stating he failed random drug test on 8/21/08 and was suspended from work. Client admits drug problem and is seeking help. Client sounded upset and tentative." This is better than, "Client called today and said that there was a random drug test at his job and he took it failed. That was on 8/21/08. So he was suspended from work and he admitted that he has had a problem with drugs in the past and now he is seeking help with this. He sounded pretty sad."
4. On the **Parent or Spouse line circle one and name** the person or write N/A if the person has no parent or spouse. If adults living at home with their parents then write the parents' names on the line.
5. If the client **referred himself say "self"** on the referral line.
6. **All dispositions** will read "referred for intake to ___ (yourself) ___ on ___ (a certain date) ___"
7. Use "**Counselor called stating**" rather than "Counselor calls and says:"
8. **These are clients who need services**, not clients who are already in services. You are a case management unit. You take people in who need help and arrange for them to receive services. Therefore don't have clients that are already in some program somewhere for one problem and call you for another problem. We want to start with clients that are not in the system at present and either have never been in the system or were a number of years ago and are returning.
9. **Under PREVIOUS EVALUATION, SERVICES, OR TREATMENT** be sure to note when, where, who the practitioner(s) was, for what. If you can't learn all this from the client because the client is not sure then state that. "Client unsure of dates"
10. You can describe client but we need to know **how the client seemed to you**. Was the person
11. hopeful, sad, dubious, quiet, loud, overly talkative?
12. We send a verification letter to all clients (for practice). We would not send a letter **if the home situation is dangerous and we would write under VERIFICATION SENT "Not sent due to home situation" or "Not sent per client request"**.
13. **We do not get medical referrals** for medical conditions. The client may have a medical condition, but we would note that not address it medically.
14. **Don't state what the client tells you as facts** that you know to be true. Use phrases like "client states....." or "according to client....." For example, you would not write husband is an abusive alcoholic." Instead, you would write, "According to client husband is abusive alcoholic." Don't state something as fact that the client has told you, but that you personally don't know to be true. For example, don't say, "her husband is abusing her." Rather say, "Client states her husband is abusing her."
15. **Discuss all the descriptions and how client seems in one sentence or together** and what client needs in one sentence or together. For example don't write how the client seemed, continue with what the client needs, return to how the client sounded, and go on with what the client is requesting. Keep all your impressions together and all your recommendations or client needs together.
16. **Do not use white out** or scribble out errors. Do use blue or black ink.