Warm Handoffs in Home Visiting

CHECKLIST

Warm handoffs (sometimes called *warm transfers*) are dynamic spaces where staff from one program introduce a family to staff from another program. To support warm handoffs, this practice resource offers reflections and tips from local colleagues and families to guide you before, during, and after warm handoffs.

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Before

Pre-meeting

- ☐ "Pre-meeting" or "check-in" with colleague from new program before meeting the family
- ☐ Case coordination

Your colleague(s)

- ☐ Learn their name
- ☐ Learn their role
- ☐ Learn how they describe the services they provide

The "new" program

- ☐ Learn what the other program can provide
- ☐ Learn program goals, purposes, and benefits
- ☐ Learn what is and is not feasible

Working together

- ☐ Learn what to expect, roles and responsibilities during handoff process
- ☐ Share what each person needs to be successful
- ☐ For video calls, use visible county or program logo

During

Initiation

- ☐ Identify a client need to be met and a program that can meet it
- ☐ Check with staff: "Hey, I have somebody who may genuinely benefit from services. Can you please come in and have a brief chat with them?"

Permission

- ☐ Introduce to client the idea of the referral: "There's this program, they'd like to talk to you about it."
- ☐ Ask the client for permission: "Do you have a few minutes to meet with them?"

Introductions

- ☐ If in person, bring client face to face[1] with program staff. "Let me go get them for you and I'll be just a minute."
- ☐ If phone or video call, initiate call with colleague and client
- ☐ Make personal introductions both ways and use names

Comunication

- ☐ Let clients hear what you are saying about their strengths, needs, and plan of care[1]
- ☐ Speak to clients and colleagues as equals
- ☐ Involve clients and make them an active member of the team[1] (e.g. "What are your thoughts on this? What questions do you have?")
- ☐ Check for accuracy of your understanding

Terminology

- ☐ Make room in the conversation for clients' equal participation
- ☐ Remember this may be clients' first time hearing this information
- ☐ Be conscious of terms you use to talk about your colleagues & program. Use terms program staff use (e.g. "in-home family support" instead of "home visiting program")
- ☐ Help alleviate stigma or fear of the unknown: explain staff roles, that you are here to help, and what that help looks like

The new program

- ☐ Encourage clients to speak up, ask questions, and join the conversation about the 'new' program.[1]
- ☐ Help clients build an understanding of the 'new' program (e.g. point out similarities and differences from current program)
- ☐ Focus on benefits of the program
- ☐ Remember clients are deliberating about whether or not this program fits them, often under time pressure

Support

- ☐ Ask clients to correct or clarify any information[1] (e.g. "Did I get that right?" "What questions do you have for us?")
- ☐ Check to see if there are any needs that we can support immediately. This may also help build rapport and create value.
- ☐ Clients may not have anticipated this meeting, so respect their time
- ☐ Share program materials
- ☐ Complete initial consent forms if family is interested

After

- ☐ Schedule intake
- ☐ Send referral form for completion

- ☐ Identify potential barriers, and help family to problem-solve to reduce barriers[2]

- ☐ Follow up with family. If appropriate ask about their experience accessing services[2]
- ☐ Follow up with colleague

1. Adapted from Agency for Healthcare Research and Quality, *Design Guide for Implementing Warm Handoffs*
2. Adapted from Reproductive Health National Training Center. *Establishing and providing effective referrals for clients: A toolkit for family planning providers.*