The Referral Process

Draft Updated October 30, 2026

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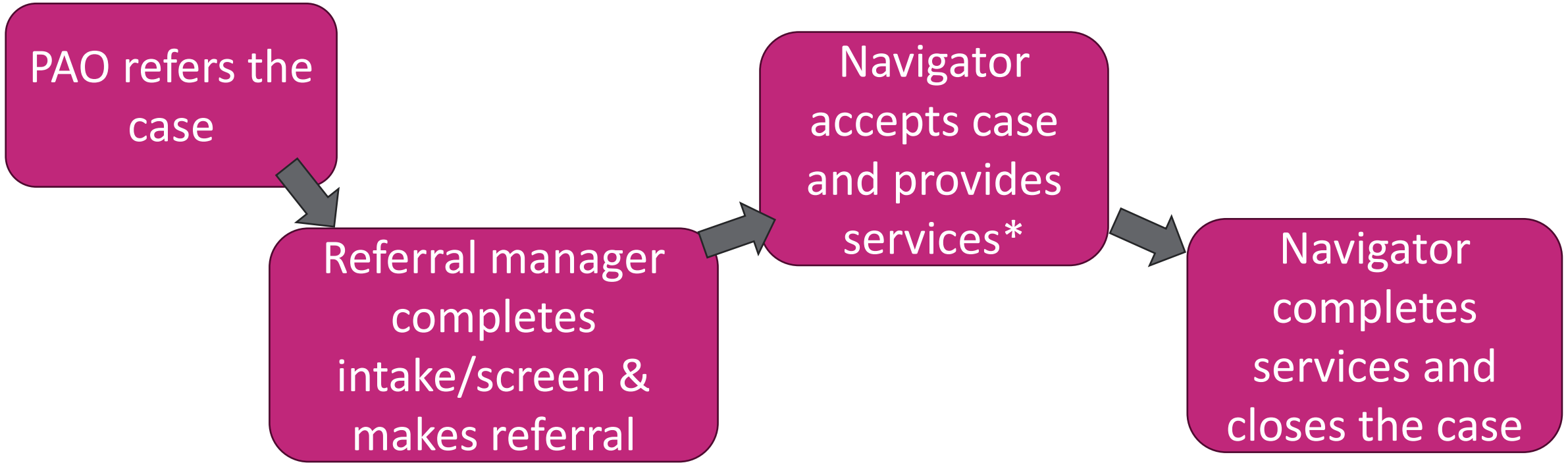
Goals of this slide deck

1. Offer a standard approach for referral management
2. Answer frequently asked questions
3. Provide clarifications as they arise

Caveats

- The outlined process is what can **generally** be expected throughout the referral process. Best serving youth and families requires flexibility.
- The process is **iterative** because it is new and being refined through trial and error. Please offer constructive feedback to improve the process.
- There may be **exceptions** to the process as outlined when it is negotiated by respective relevant parties. (Ex: a case needs to be transferred to better be served by another navigator).

General Process Overview



* Completes organizational intake/assessment, goal-setting, mentoring/programing/referrals, etc.

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1. The Referral Process

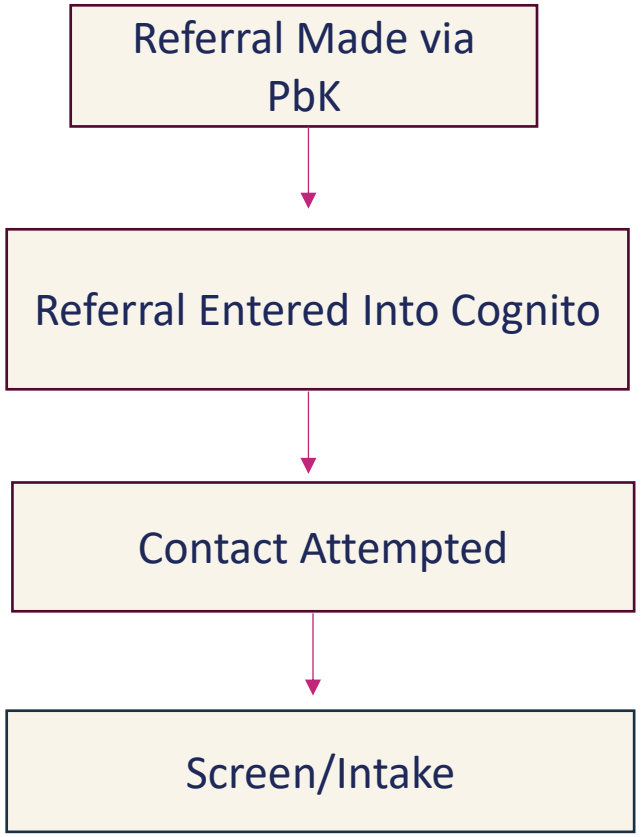
- From initial screen and intake to navigator assignment

Initial Screen and Intake by Referral Manager

- Referral is made by PAO via the secure PbK System
- Referral information is entered into Cognito
- At least 3 contact attempts are made via text and calls
  - When more phone numbers are needed, PAO is sometimes able to offer more
- When contact is established, a screen and intake is completed
- Information is gathered for data reporting, to determine fit, and to provide preliminary information to navigators

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Initial Screen and Intake



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Case Statuses Provided to PAO

Live updates are entered into PbK database

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- Case statuses provided to PAO by referral manager

1. **“Accept”**
   - The guardian signs the release of information or
   - The guardian/youth receive services from the referral manager

2. **“Decline”** when they
   - Are offered services and refuse to participate
   - Stop responding to manager’s contact attempts

3. **“Unreachable”** The referral manager is unable to contact a family

The Consent Process

When a youth/family agree to participate

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The referral manager:

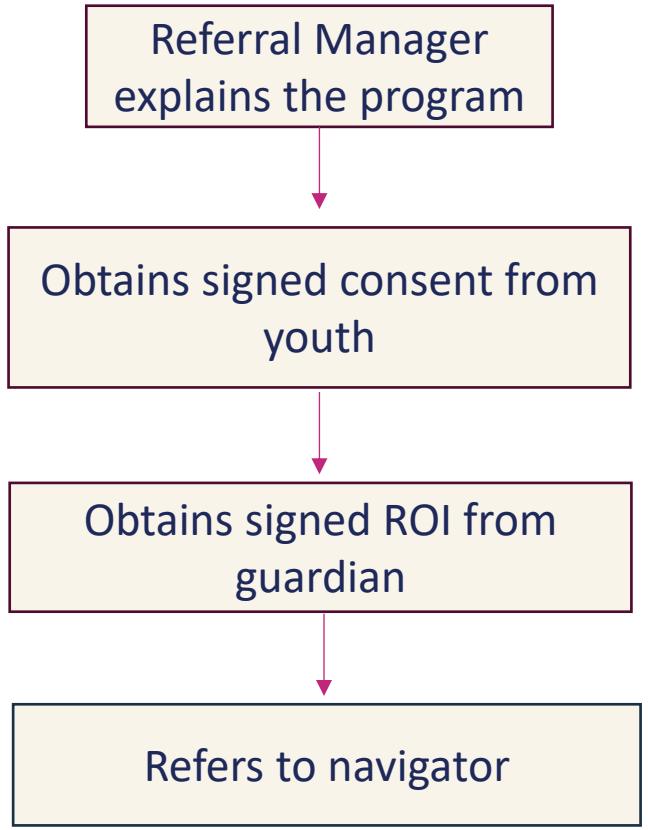
🗨 Explains the program

✉ Emails the youth a consent form. Once signed,

📠 The guardian is sent a release of information permitting King County to share information with the consortium. Once signed,

➤ The case is assigned to a navigator

The General Consent Process



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1. The Navigator Assignment

- From referral to navigator to providing services

Referral is Assigned to a Navigator

When it's e-mailed via Cognito

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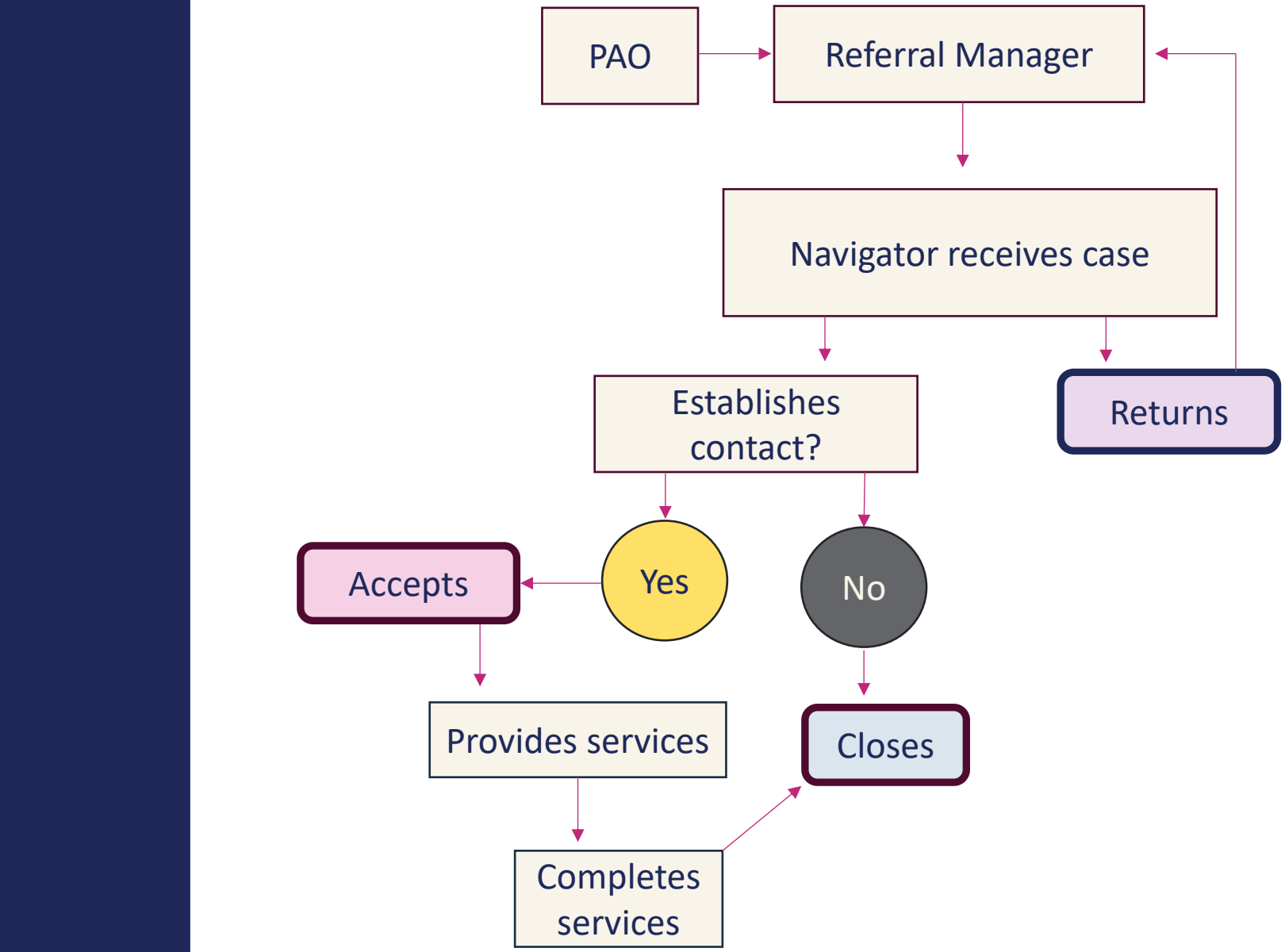
◈ Consideration for assignment include geographic location, identities, language spoken, needs, case load capacity, other involved parties, and interests.

✉ Referral is made via Cognito and sent via email to navigator and designated managers.

☎ The navigator sets up a phone call/meeting with the referral manager to obtain pertinent details about the case.

◷ Within 2-3 business days of receiving the referral, the navigator initiates attempts to establish contact with the family.

Cognito Referral Outcomes



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Providing Services

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☎ Within 2-3 business days of receiving the referral, the navigator attempts to establish contact with the family.

❓ If the navigator is unsuccessful establishing contact, they may ask the referral manager for support. The referral manager may reach out to the family or ask the PAO for more phone numbers.

✕ When 3-6 contact attempts are unsuccessful, the navigator will close the case in Cognito within 90 days of the PAO referral date.

⊙ Within 3-6 interactions, the navigator completes an assessment and a co-designed support plan.

3. Closing Out a Case

- When the navigator stops working a case

Closing Out Cases

- When a case is closed out, the navigator “Closes” the case in Cognito by selecting that button and entering the date and reason it was closed out.

- Cases should be closed when:
  - The program was completed
  - 3-6 attempts were made to contact the family and there was no response within 90 days of the PAO referral date
  - The family no longer wanted services
  - Contact with the family has been lost
  - The family moved
  - Other – provide a reason

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Closing Out Cases

Entering reason in Cognito examples

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- When entering a reason for closing out a case in Cognito, give a specific reason and at which point in the process services ended, and how much work was done.
- Examples of what to write in the field:
  - The program was completed when youth accomplished their goals
  - Navigator was unable to make contact to complete intake after 10 contact attempts
  - Lost contact with the family after providing services for 6 weeks
  - Lost contact with the family after completing 1 goal
  - After the intake, family stopped engaging with the navigator
  - Navigator and referral manager were unable to arrange a first meeting
  - Youth refused to attend first meeting
  - 6 arrangements to meet with youth for first meeting were rescheduled/cancelled
  - The family moved out of state after receiving services for 3 months
  - 5 attempts to arrange meeting with youth through parents or referral manager were unsuccessful

Closing Out Cases

Entering reason in Cognito – What NOT to do

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- Please do not enter too much information, be vague, or close out case without working with the parent first.
- Examples of what NOT to enter:
  - “Lost contact”
  - “Youth not responding to calls or text”
  - “No response”
  - “Lost contact after multiple attempts”
  - “They didn’t attend meeting”

FAQs

- Q: Do we have to update the referral manager on cases?
- A: You don’t have to but if you need support I am more than happy to provide you with resources or strategies.

- Q:
- A:

- Q:
- A:

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