



Design Your Referral Forms

Consider the best practices below as your school-based referral pathway team designs your referral forms. The [Build Your Referral Pathway](#) resource will provide you with guidance on what to do before and after a referral is made. After reviewing the best practices below, you'll find the following sample referral forms to adapt to fit your school's unique context and resources. Access an editable version of each form by clicking on the links below.



[Sample Referral Form
for Staff](#)



[Sample Self-Referral Form
for Families](#)



[Sample Self-Referral Form
for Students](#)

SCHOOL RESOURCES AND CAPACITY

We have completed a [resource map](#) to identify staff and resources that can provide sustainable support to families and students in the following areas:

Academic (schoolwork, not meeting grade level standards)

Attendance (missing class, tardiness)

Social-Emotional Behavioral/
Mental Health


Conflict Related (challenges with relationships)

Physical Health (healthcare, vaccinations, vision or hearing screening)

Family Support (food access, housing, transportation, etc.)

We have clear entrance and exit criteria for those in need of and/or receiving support.

Our school monitors our Multi-Tiered System of Supports interventions and student progress for applicable areas of support.



Determine your own examples for each area and list a few on the referral form for staff who might not be sure how to categorize their concerns.

ACCESSIBILITY AND CONFIDENTIALITY


Our school educates students, staff, and families on how to access referral forms.

Hard copies can be found at
(insert location).

ADA compliant digital copies can be found at *(insert location)*.

Staff are available to help complete the form. *(insert staff and office location)*

Think about the user when you determine where to keep hard copies of forms. You may want student self-referral forms in every classroom, but only need family self-referral forms in the front office or at specific events.



Our form is translated into the following community languages:

Our school shares what to expect after a referral form is submitted, such as timelines and what typical follow-up from staff might look like.

Our school treats each case with confidentiality, following Family Education Rights and Privacy Act, the Protection of Pupil Rights Amendment guidelines, and other applicable state laws. Completed forms will be stored at *(insert location for hard and digital copies)*:

GATHERING MORE INFORMATION

As you select which questions to include on your own form, remember that an effective form collects enough information to point toward the right support, but is not too burdensome to complete. Too many questions on a self-referral form may overwhelm students and families who are nervous about documenting concerns. Below are questions you could ask in a face-to-face conversation to learn more:

- What are you thinking, feeling, doing or experiencing that you need support with?
- How long have you been struggling with these challenges?
- How often do you face this challenge?
- If you are comfortable sharing, what are your strengths, interests, or accomplishments that you're most proud of? We want our plan for support to celebrate and build on the things you are proud of, and this helps us get to know you better.
- What else do you want us to know so we can support you?

A great referral form is just one step in building an effective referral pathway. The Build Your Referral Pathway resource will provide suggested action steps to take after a form is completed.




This resource references and builds upon ideas from the following sources:

National Training & Technical Assistance Center. (2015, September). School Mental Health Referral Pathways (SMHRP) Toolkit. Retrieved January 20, 2023, from <https://nttacmentalhealth.org/resource/school-mental-health-referral-pathways-toolkit/>

U.S. Department of Education. (2022, November 1). Protecting student privacy: U.S. department of education. Protecting Student Privacy | U.S. Department of Education. Retrieved January 20, 2023, from <https://studentprivacy.ed.gov/>

U.S. Department of Justice and Civil Rights. (2021, March 18). Guidance on web accessibility and the ADA. ADA.gov. Retrieved January 20, 2023, from <https://www.ada.gov/resources/web-guidance/>

Sample Referral Form for Staff

 [Create your own form with this editable template](#)



NOTES TO STAFF:

Any individual staff member can submit a referral, though we encourage staff with shared concerns to collaborate on one form.

The referral team will contact you within *<insert timeline>* to learn more about the support your student needs and how we can help.

Please include any supporting materials (grades, incident reports, documented interventions, etc.) to help us identify which students need more targeted or intensive support.

Behind this form is a student and family deserving of privacy and respect. Please review any [Family Education Rights and Privacy Act](#) or the [Protection of Pupil Rights Amendment](#) considerations if needed throughout this referral process.

Date of Referral:

Student Name, Nickname and Pronouns:

Student Grade:

Your Name(s) and Relationship(s) to Student:

Contact Email:

NOTE: If this is a crisis referral, please contact *<Insert a school administrator's contact information and any relevant action steps>*.

Reason for Referral — Areas for Growth and Development

I am referring this student for support in the following area(s):

- Academic
- Attendance
- Social-Emotional Behavioral
- Discipline or Conflict Related
- Mental Health
- Physical Health
- Family Support
- Other:

Was this student flagged as needing intervention based on a universal screener?

- YES NO

Name of universal screener:

Score or indicator from universal screener:

Checklists of behaviors may lead staff to view their students and families as problems or make assumptions before having all the information. Open-ended responses will help staff stay curious, think deeply about the context of their concerns, and consider their role in support.



What new and persistent issues does this student/family need support with?

How long have you had these observations and how often do they occur (if relevant)?

If applicable, where does this concern typically appear? For example, classroom, morning meeting, cafeteria, or traveling to and from school.

Sample Referral Form for Staff

Student Background Information

Date you informed the family of this referral:

Briefly describe how you have collaborated with the family and student about this concern:

Share strengths, interests, attributes or accomplishments of this student or family to paint a fuller picture for any community partners collaborating with the school for support. When have you seen them thrive or stand out? Challenge yourself to think beyond traditional school strengths.

Please share any information about programs or support this student currently receives or has received for this referral area. Include in-school and out-of-school supports and their results:


It can be easy for educators to create stories about students and their families, especially those needing extra support. Encourage staff to stay curious, asking questions and be open to discovering more about their students before drawing conclusions. [Check out the Reflective Questions to Support Reframing resource to foster this approach in your staff.](#)



Supports or resources the student/family has received	Who provided support?	When and how often was support provided, including dates	Summary of results or progress

Optional: Do you have any ideas or recommendations for how the team can better support this student? What strategies or resources come to mind?

Sample Self-Referral Form for Families

 [Create your own form with this editable template](#)



NOTE TO FAMILIES:

Our staff is committed to upholding your rights as caregivers and follows the rules outlined in the Family Education Rights and Privacy Act, Protection of Pupil Rights Amendment, and *<insert relevant state laws as needed>*. This means that information will be shared only with school personnel who have a role in supporting you and your child.

Our staff are legally required to report concerns about abuse, neglect, or safety to other agencies as outlined in *<insert state specific resource or URL>*.

The referral team will contact you about your referral form within *<insert timeline>* to learn more about the support you need and how we can help. If you haven't heard from the team by *<insert timeline above>*, please contact *<insert Referral Team email address>*.

If you are not comfortable sharing your information with the school, we have attached a list of our community partners who can provide support to you without a referral from our school.

Date:

Student or Family Name, Nickname and Pronouns:

Student Grade level:

Contact Information (Phone, Email):

Can we leave a voicemail?

YES NO

Can we send texts to the phone number listed?

YES NO

Preferred language for communication:

Describe what type of support you are looking for. Below are some examples of supports that our school has provided in the past. If you're not sure if our school has the support you're looking for, please still submit a request.

Is there a trusted member of the school community you would like us to talk to about this concern?

What do you think will help? What has helped you in the past or helps you currently?

Examples of ways our school can support you:


- Help with schoolwork or attendance
- Managing behavior at school
- Navigating a relationship or conflict
- Connecting to childcare and before or after school activities
- Healthcare services, vaccinations, or tobacco cessation support
- Access to healthy food, clothing, school supplies or hygiene products
- Housing support

Share a realistic list of examples of help your school can provide to students and families.



- Job placement assistance
- Language learning or literacy support
- Legal services
- Mental health counseling for the individual or family
- Transportation services

Sample Self-Referral Form for Students


 Create your own form with this editable template



NOTE TO STUDENTS:

A staff member will have a conversation with you <insert timeline> to learn more about the help you need, so don't worry about including too many details.

If you are not comfortable asking for help directly, we have attached a list of resources you can reach out to.

 Some of the language is more appropriate for upper grades. Tailor this form to meet your students' developmental needs. Less is more with student self-referrals. The goal is to help students make the initial request for help on this form rather than gathering lots of information. Trained staff can gather more information in a thoughtful follow up conversation with the student.

Date:

Your Name, Nickname and Pronouns:

Your Grade and Homeroom Teacher:

Preferred language for communication:

Is there a trusted teacher or adult you would like us to talk to about this concern? If so, who?

What kind of help are you looking for? Select all that apply.

-  Help with schoolwork or attendance
-  Managing your feelings or behavior
-  Navigating a relationship or conflict with a classmate or teacher
-  Connecting to clubs or out of school activities
-  Healthcare services, vaccinations, or tobacco cessation support
-  Access to healthy food, clothing, school supplies or hygiene products
-  Housing and job placement assistance for your family
-  Help with learning a new language
-  Mental health counseling for you or your family
-  Transportation to and from school
-  Other:

Review your list of examples to make sure there is no jargon and students can understand what support might look like.

