

# How to Make a Referral

## COUNSELOR OF THE DAY (COD)



COD sessions are a one-time CBHS support service based on availability. All participating clients will have the option to engage in weekly scheduled therapy sessions. Prior to making any referral, be sure to confirm that the client wants the support and that they clearly understand what form of support they will receive (in-person or phone). The first three steps below explain how to make the referral.



### CONFIRM OPTIONS: IN-PERSON OR PHONE SUPPORT

Check the COD board to confirm if an in-person session is available. Not sure? Ask FRC Managers. If a CBHS Intern is not available for an in-person session, then review the guide below to request phone support with a CBHS team member. The goal of phone support is to connect with the client by the end of the day. Be mindful of requests near the end of the day and let clients know that they may be called the next morning.



### IN-PERSON: TALK TO THE COD

The COD board communicates COD shifts, which Intern is working and if an in-person session is available. Unsure? Check in with FRC Managers. Generally speaking, check the board, confirm which intern is available then speak to the intern directly to connect them with your client. Update the intern on: 1) reason for referral 2) any important details 3) let them know where to find you so you can reconnect to your client after the COD session 4) If you won't be available to reconnect with the client after the session, inform the intern and they'll email you with any updates.



### PHONE SUPPORT: SEND THE EMAIL

Email [codrequest@compass-sf.org](mailto:codrequest@compass-sf.org) (includes the Clinical Director, CBHS Program Director, CBHS Assistant Program Director and a CBHS Clinical Supervisor) with the following: 1) Client name and/or link to case record 2) Client phone number 3) Language preference 4) Specific reasons seeking support 5) Client availability. Phone support utilizes all CBHS team members. The referrer will be included on email replies to confirm that the client will be connected to support.



### REMINDER: COD SESSIONS ARE BASED ON AVAILABILITY

Before you offer any support to your client, be sure to confirm availability. In other words before asking "Would you like to speak with a counselor for additional support?" ask "Would it be helpful to speak with a counselor for additional support? I'll confirm if we have someone in-person to speak with now or if someone will call you by the end of the day." For phone support, be sure to inquire with the client about their availability. E.g. they may be unavailable for the remainder of the day and a COD call tomorrow would be the best option.



### REMINDER: BE AVAILABLE AFTER IN-PERSON COD SESSIONS

You've been the first point of contact with the client. In many cases, speaking with a therapist was not the reason they were connecting with you today. We always want to be mindful that the client leaves Grove Street with a sense of completion and an understanding of next steps. Communicate with the COD about where they can find you within the hour and if you won't be available, if there is anything the client should know, e.g. do they have your business card, have they finished any intakes, will you be reaching out to them, etc.



**Questions? Don't hesitate to check in with Susan, Claire or Erik.**