

Closed-Loop Referral Readiness Checklist

Six questions to ask of whatever you run today, whether that is a platform, a module inside your record system, a shared spreadsheet, or a phone and a good memory. Nothing here requires buying anything.

HOW TO USE IT

1. Answer for the process you actually run, not the one on the workflow diagram.
2. Answer for a normal week, when someone is out and the queue is backed up.
3. Mark your earliest **No**. That is where to start, even if a later one hurts more.
4. Fill it in on screen and save it, or print it and work through it with your team.

STEP	THE QUESTION	YES	PARTLY	NO
1 Intake BREAK POINT 1	Can you produce a record of every need your staff identified in the last 30 days, including the ones nobody acted on? WHAT GOOD LOOKS LIKE: needs are captured in a shared record when they are identified, not reconstructed later from visit notes.	☐	☐	☐
2 Routing BREAK POINT 2	Does each referral reach a named person at the partner organization, within a response window both sides agreed to? WHAT GOOD LOOKS LIKE: for your three most-used partners you can name the recipient and the window without looking either one up.	☐	☐	☐
3 Acceptance BREAK POINT 3	Do you get an acknowledgment when a partner takes a referral, and do you find out quickly when they do not? WHAT GOOD LOOKS LIKE: silence shows up within days and is treated as an unanswered referral rather than as agreement.	☐	☐	☐
4 Delivery BREAK POINT 4	Is there a record of what service was delivered, by whom, and on what date? And when it is not delivered, does anyone tell you why? WHAT GOOD LOOKS LIKE: a referral that ends without a service produces a reason, not silence.	☐	☐	☐
5 Confirmation BREAK POINT 5	Does the loop close on its own, or does closing it depend on someone remembering to follow up? WHAT GOOD LOOKS LIKE: confirmation arrives as part of the partner's own workflow, not as a favor to yours.	☐	☐	☐
6 Reporting BREAK POINT 5	Could you produce what your funder asks for this quarter without rebuilding it by hand? WHAT GOOD LOOKS LIKE: reporting is a query against records that already exist, not a reconstruction project in the last week of the quarter.	☐	☐	☐

Start at the earliest pain point. Not the loudest one.

Reporting is usually where it hurts most, and it is usually not where the problem is. Fixing a later step while an earlier one is broken produces confident reporting about the wrong population. Work the list in order.

If working through this surfaced a gap worth talking about, we are glad to have the conversation. If it did not, the checklist still did its job.

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