



Warm Referral & Follow-up Log

Use this to track whether a caregiver actually reached the service. Record only the minimum information needed for navigation and follow-up. Do not turn this into a duplicate case file.

Caregiver

Date of contact

Main practical issue

Navigator / staff

Referral 1

Service / program

Contact or link provided

Referral sent / introduced on

Who will contact whom

Expected response time

Follow-up

- ☐ Caregiver reached the service.
- ☐ Service accepted the referral.
- ☐ Another document / eligibility step is required.
- ☐ Referral did not fit and another option is needed.
- ☐ Caregiver does not want further follow-up right now.



Warm Referral: Outcome & System Learning

Follow-up date

Outcome

Next referral / next action

Next check-in date

Barrier encountered, if any

- ☐ No answer / could not reach service
- ☐ Eligibility unclear
- ☐ Wrong referral / redirected
- ☐ Wait list
- ☐ Transportation / distance
- ☐ Technology / online form barrier
- ☐ Documentation / legal authority issue
- ☐ Cost / affordability
- ☐ Caregiver chose not to continue
- ☐ Other

Anonymous system-learning note

Keep the distinction clear

Navigation data should show whether the handoff worked, not reproduce private child-welfare, legal or medical files.