

## Chapter 5 : OhioKAN Service Delivery

### Referral Follow Up

A written procedure guides follow up, which happens at a convenient time for the family no more than 30 calendar days after the initial referral. The purpose of this contact is to ensure OhioKAN Families receive appropriate referrals for the needs they have identified in the BASICS assessment, learn about barriers to access, and ensure all needs are met. For further details on referral procedures, see above section on appropriate referral.

### Before Following Up

Prior to dialing the OhioKAN Participant's number or sending an email, the navigator reviews the documentation for the service episode, paying specific attention to the needs identified on the BASICS assessment and the household composition. Navigators are encouraged to use names of household members whenever possible. For example, instead of saying, "how is your niece doing in her transition to the new school?" say, "how is Brittany doing in her transition to the new school?"

### Follow Up Contact

Each family will receive a follow up contact as scheduled during the initial call and via their preferred method (e.g., phone call with a voicemail, text message, or email). Contacts with the family will be documented in the data system with a separate activity log for each contact. OhioKAN staff are expected to complete up to three additional contact attempts to reach a family if the originally scheduled follow-up contact is unsuccessful. These additional contact attempts should occur within five business days of the originally scheduled follow-up contact. Additional contact attempts may involve using different contact methods (phone call, text message, or email), prioritizing the family's preferred contact method. If the family does not respond to the scheduled follow-up contact and three attempts to reach them have been made, OhioKAN staff will close the service episode 30 calendar days after the initial referrals were provided.

### During the Follow-Up Contact

- Greet the person by name and identify yourself as a navigator from the OhioKAN program.
- State the purpose of the call:
  - To follow up on the referrals made during the prior call.

- To hear about their experience accessing the service and learn if there were any barriers to service access.
- To see if any other needs have come up.
- Ask about each referral made and document the participant's response.
  - Has the person attempted to access the referral resource?
    - If not, were there any barriers that prevented them from trying to access the service?
    - If the person did not have time to act on the referral, help them think through a plan to do so by asking questions like, "Is there a time within the next week when you will have time to reach out to this organization?"
      - If the person makes a plan to access a referral they have not yet attempted to connect with, ask them if they would like you to follow up again. Specify a best date or time of day to reach them and set yourself a reminder.
      - You may also ask the family if they need additional support in accessing a referral. If they would like additional support, ask if they have time to complete a Support Plan or would like to schedule a different time to complete it. Provide a brief overview of what to expect in creating the Support Plan so they can make an informed decision.
  - If the participant did attempt to access the referral resource, what was the result?
    - If the organization does not provide the service or has a waitlist, ensure this is documented and provide an alternative referral if possible. If an alternative referral is not possible because no other services are available, document this and elevate the service gap to the Regional Coordinator.
    - If the participant was told they were not eligible for a service, clarify eligibility.
  - Since the last conversation, have any new needs arisen?
    - If new needs have arisen, document these needs in a new BASICS and provide additional referrals to address these needs.
    - Ask the family if they would like additional information and referrals to meet these needs, or if they would like additional support.
  - Ask if the person feels all their needs have been met at this time.
    - If yes, close the service episode.
    - If no, ask open ended follow up questions to learn more, document the need, and provide additional referrals as appropriate.