PREPARED BY
Los Angeles LGBT Center

Referral & Warm Handoff Toolkit for Providers Working with LGBTQ+ Youth

What is a Warm Handoff?

A warm handoff is the process of smoothly transitioning a patient's care from one provider to another, (for example: mental health clinician to care coordinator, housing specialist to substance use treatment provider). This ensures that important information is communicated effectively and the client feels well-supported throughout the transition. Warm handoff approaches help to prevent gaps in care, enhance patient satisfaction, and improve overall healthcare outcomes. This in-person transition reduces the typical barriers that exist between all three parties (client, providers, & referral partner), and specifically aims to help client meet someone who can address some of their immediate needs and/or questions.

Why are Warm-Handoffs Important?

Prioritizing effective collaboration between primary care, behavioral health, administrative, and support staff can provide smoother transitions for patients and contribute to their overall satisfaction with the care they receive.

LGBTQ+ youth often encounter more difficulties when accessing services due to a lack of culturally competent care and understanding from service providers. Discrimination, stigma, and inadequate training can create barriers that hinder LGBTQ+ youth from seeking and receiving the support they need, so it’s essential that providers take the opportunity to demonstrate transparent exchange of information and build trust and rapport.

Handoffs & Referrals are complex in nature, since they can occur in a variety of settings, which is why a safety culture supports identifications of problems and errors to be addressed to prevent recurrence. This culture of learning promotes desired outcomes and enhancement of patient safety.

Steps for Implementing Warm Handoffs

Prepare

Before meeting with your client, set aside time to gather essential information about the person/people you are introducing. Information should include individual's name, role, working hours and any relevant background information about the individual(s) you're connecting them with.

Addressing the Client & Introductions

Let your client know what the itinerary is for the day, and who you'll be introducing them to. Let them know what role the individual will play in their care plan. For some folks, it might be helpful to remind them that you'll be alongside them during the introduction process.

When introducing yourself to clients, show up in a warm and welcoming manner, using your first name, professional title, and pronouns. This establishes rapport and trust while conveying respect and an approachable demeanor. Introducing yourself with pronouns demonstrates to others your commitment to fostering safe and supportive spaces for clients of all gender identities. For many, it may be the first time they hear a provider offer up a space to introduce and hear other's pronouns.

"Hi, my name is Yoshi, I'm a case manager here at [Name of Organization] and my pronouns are he and they."

When introducing clients to new individuals, use the individual's name, and role in their care. This reaffirms the trust in your connection and helps the client feel at ease. You can say something like:

"I'd like to introduce you to [Name], our [Role] here at [Name of Organization]. They will be supporting you with [specific task or responsibility]. "

Highlight Expertise: *Mention any expertise or qualifications that the introduced person brings to the client's care, this can reinforce the importance of their supportive role in the client's care plan.*

Ensure Consent & Establish Collaboration

Ensuring that the client is comfortable with the introduction and being involved with the new member on the care team. You can show them that you respect their preferences and boundaries by affirming clients for any emotions they express related to adding new people to their care plan.

Stress the importance of collaboration to ensure that client's needs are met comprehensively. Using phrases like "We're working together to support you in..."

Leaving the Door Open for Questions

After the introduction, offer the client an opportunity to ask any questions they might have bout the introduced individual's role, responsibilities, or qualifications.

Leaving the door open for clients to ask questions is vital as it empowers them to actively engage in their own care, fostering a sense of autonomy and informed decision making. Encouraging questions also creates a supportive environment where clients feel valued and understood, leading to clearer communication and more effective outcomes.

Following Up

Make plans to touch base with the introduced person to ensure they had a positive interaction with the client and address any concerns or questions they may have.

This can also be an opportunity to make sure documentation is up to date, and to make sure they were able to get their needs met with the new individual.

Tips for Virtual + Hybrid Services

Warm handoffs between staff and between different teams can also occur virtually if in-person services are not available. When hand-offs and referrals turn virtual, it's important to prepare for potential communication disruptions and misinterpretations that are more likely to come up.

If plans are made to introduce a client to a new member of the care team, have clear instructions with contact information (calendar event, zoom video link, phone call.) readily available. Similar to in-person warm handoffs, it's important to have the backend logistics prepped and ready to go before meeting with the client.

If you are the virtual provider, set up a waiting room through your video conferencing platform and allow for brief interruptions when you are with other clients. This requires letting scheduled clients know the reason this is important ahead of time.