Primary care health professionals frequently need to refer a child or adolescent, parent, or the family as a whole for mental health services. Making a successful referral involves many factors, including having a trusting relationship with the child or adolescent and family, understanding the concerns that need to be addressed in treatment, and establishing a collaborative relationship with the mental health professionals who will be providing care. Helping a family accept a needed mental health referral can require time and preparation. The following suggestions provide a framework for making an effective referral:

- Describe how you anticipate a referral being helpful, not just in addressing problems but also in supporting the child’s or adolescent’s and family’s strengths.
- Reassure the family that you will continue to be involved in their care. Some families may require further discussions with you or more time to consider your recommendation for a referral.
- Ask for feedback on how family members feel about the mental health referral. Discuss any preconceived ideas, fears, or concerns they may have about the referral. Ask about any prior experiences with mental health services.
- Ask about the family’s hopes and goals for the child or adolescent and the entire family. Interview the child or adolescent and key family members to gain a further understanding of the concerns that are most distressing for them.
- Focus on the child’s or adolescent’s well-being, even if discussing a referral for an adult family member. This approach can help families act “for the child’s sake” when it may be difficult for them to seek treatment for themselves. Avoid any inferences that a particular family member is at fault.
- Provide the family with the names and phone numbers of mental health colleagues who are available and whom you can recommend with confidence. For families who may have difficulty in following through with scheduling a referral, consider calling to set up the appointment, or having the family call to schedule the appointment during their visit with you.
- Send the family a handwritten note emphasizing your concern for their well-being, and stating the benefits of keeping their appointment with the mental health professional.
- Maintain contact with the family, either by scheduling a follow-up appointment or by phone after the referral is made. Establish office systems to track referrals and to prompt for further follow-up activity.
- When making a referral to a mental health colleague, be specific about your concerns. Provide relevant medical, developmental, and family history together with the family’s written consent for communication. Indicate how you would like to be contacted for feedback (e.g., via letter, fax, phone, e-mail). Ask to be notified if the family does not keep their initial appointment or has challenges with following through with treatment. (See Tool for Health Professionals: Referral for Mental Health Services, Mental Health Tool Kit, p. 14.)
- If the family does not accept your initial recommendation for a mental health referral, continue to provide health supervision, guidance, and education to emphasize how helpful treatment can be in addressing current or further difficulties. Consider consulting a mental health colleague for additional ideas on how to continue to support the family while helping them become more receptive to treatment.