REFERRAL KIT · FOR THE OWNER

How to use this kit

One folder per office. Three pieces inside, each written for a different person.

Intro letter
For the practice manager. Decides if the rest gets kept.

When-to-refer sheet
For the doctors. One per exam room, laminated if you can.

Referral form
For the MA or front desk. Five copies, plus one taped by the fax.

Where you are now

41
physician referrals last year

29
from your top 3 offices

11
offices sending 0 to 2 each

The drop-off (Tuesday to Thursday, 1:30 to 3:00)

Avoid Monday mornings and the lunch rush. Ask for the practice manager by role. If they are out, leave the folder with the letter on top and write the date on your tracker.

> "Hi, I'm with Small Voices, the pediatric speech practice. We get kids in for evaluations in about two weeks and we send the doctor a summary afterward. I brought a one-page referral form and an exam-room sheet. Could these get to your practice manager? I'd love five minutes with them whenever is easy."

Start with the eleven, not the three

Your top three offices get a thank-you visit and fresh forms. The kit is built for the eleven who barely refer: the goal is that the next "let's wait and see" becomes a faxed form.

Before printing: confirm the insurance list, fax number, secure email and the red-flag ages on page 3 with your two therapists.

INTRO LETTER · TO THE PRACTICE MANAGER

Small Voices Speech Therapy

[Date]

To the practice manager,

I'm the owner of Small Voices Speech Therapy, a pediatric practice with three licensed speech-language pathologists. We see children from 18 months to 12 years for late talking, speech sound errors, stuttering, feeding difficulties and communication devices.

I'm writing to you rather than the doctors because you are the one who knows what actually gets used in your office. I've tried to make referring to us take less staff time, not more:

- **One page, one fax.** The enclosed form has eight fields. No clinic notes required to get a child on our schedule.
- **We call the family.** Your staff does not need to schedule anything. We reach out to the parent within one business day of receiving the form.
- **Evaluations in about two weeks.** We usually schedule within 10 business days.
- **You hear back.** We fax an evaluation summary to the referring provider after the visit, so the loop is closed in your chart.
- **Insurance.** We accept most commercial plans and Medicaid. We verify benefits for the family before the first visit.

I've also included a one-page sheet for exam rooms listing the ages when a referral is worth making, so "let's wait and see" has a clear line.

I would welcome ten minutes to answer questions, or to drop off lunch for your staff on a day that suits you. I'm also glad to adjust the form if your system needs something different.

Thank you for looking this over.

Warmly,
[Your name], CCC-SLP
Owner, Small Voices Speech Therapy
Phone [phone] · Fax [fax] · [secure email] · [your-site.com]

> Confirm "within one business day" and "10 business days" are true for every week of the year, including school breaks.

FOR EXAM ROOMS · WHEN TO REFER

When "wait and see" isn't the answer

Refer for a speech-language evaluation if any of these are true. Parent concern alone is a reason to refer.

Age	Refer if the child...
12 months	Is not babbling with consonants, pointing, waving or responding to name
18 months	Says no words or only a few; does not follow simple directions with a gesture
24 months	Has fewer than 50 words or no two-word phrases ("more milk")
3 years	Is understood by unfamiliar adults less than about half the time; no short sentences
4 years	Is not understood by unfamiliar adults most of the time
Any age	Loses words or skills they had; parent reports frustration or tantrums tied to talking
Stuttering	Lasts more than 6 months, shows tension or facial struggle, or the child avoids talking
Feeding	Coughs or gags at most meals, eats fewer than 20 foods, or has trouble moving to textures

Therapists: confirm these ages and cutoffs match the criteria you want doctors to use.

What happens after you refer

1. Fax or secure email
the one-page form

2. We call the family
within 1 business day

3. You get a summary
faxed after the evaluation

Small Voices Speech Therapy · Ages 18 months to 12 years · Most commercial plans and Medicaid
Fax [fax] · Secure email [secure email] · Phone [phone]

REFERRAL FORM · FAX OR SECURE EMAIL

Speech-Language Referral

Send to **Small Voices Speech Therapy** · Fax [fax] · Secure email [secure email]
Please do not send patient information by regular email.

1. CHILD'S NAME

2. DATE OF BIRTH

3. PARENT / GUARDIAN

4. PARENT PHONE

5. INSURANCE PLAN AND MEMBER ID

PREFERRED LANGUAGE AT HOME

6. REASON FOR REFERRAL (CHECK ALL THAT APPLY)

- ☐ Late talking / few words
- ☐ Hard to understand
- ☐ Stuttering
- ☐ Understanding directions
- ☐ Feeding / picky eating / gagging
- ☐ Loss of skills
- ☐ Needs communication device (AAC)
- ☐ Parent concern

NOTES (OPTIONAL)

7. DIAGNOSIS CODE(S), IF KNOWN

8. REFERRING PROVIDER, SIGNATURE AND DATE

OFFICE NAME

OFFICE FAX (FOR OUR SUMMARY)

We will contact the family within one business day and fax an evaluation summary to the office above.

FOR THE OWNER · FOLLOW-UP

After the drop-off

When	What
Day 1	Drop off the folder. Log it in the tracker.
Day 3	Send the follow-up email to the practice manager (paste-ready file included). Offer a staff lunch.
Week 3	Second visit: fresh forms, ask whether the fax number reached the MA station.
Every referral	Within one business day of the evaluation summary, send a short thank-you fax to the referring provider.
Every quarter	Restock forms at every office that has referred at least once.

Tracking table

Office	Drop-off	Met manager?	Email sent	2nd visit	Referrals since

The full 14-office version is in the spreadsheet that came with this kit.

What to watch

- Which offices send their first form, and how long after the drop-off.
- Forms that arrive missing fields. If the same one keeps going blank, cut or move it.
- Families who were referred but never answered your call. Ask the office whether a parent handout would help.

> Print counts per office: 1 letter, 3 exam-room sheets, 6 referral forms. Fourteen offices is 14 letters, 42 sheets, 84 forms.