

How to Make A Church Referral

As you are working with your client, you may decide to connect with a church.

Obtain signature of client for release of information. The consent form is the bottom of the Evangelism Intake Form. This sheet must remain in the client's file – do not shred.

Also make sure we have permission to contact the client on the general page. If the client gives us permission to contact her by phone, mail, email, make sure it is marked on the general contact page in ekyros.

Check the Church Referral list in the address book (instructions below) to see if the church is on the list. If it is not on the list the Executive Director or Client Services Director, must make the initial contact with the church. They will establish a contact which may be the Pastor or a Church Liaison. They will ensure the church is compliant with our Client Referral to Churches Policy and develop the relationship.

If the church is on the Church Referral list, you will send the referral via email (Instructions below). Tracking of referrals is important. Having all outgoing correspondence and incoming responses sent to one email address will allow for better tracking and client follow up.

To send a client's information for a church referral:

1. From any computer click on the Internet Explorer
2. Type in the address bar: <http://email.choicesforwomen.org>
3. Enter Email Address: churchreferral
4. The email address is churchreferral@choicesforwomen.org
5. Enter Password: _____
6. Click on the Login button
7. You will be on a screen with a title "Web-based email"
8. You will see tabs, "Check Email, Compose and Address Book"
9. If you click on the Address Book tab you will see the list of churches that we have an agreement with. If the church you wish to select is not on the list, please check with the Executive Director or the Client Services Director as previously mentioned.
10. While in the Address Book section, you may click on the edit button next to the church to see the church's location.
11. To send the referral, you will need to click on Compose.
12. Click on the highlighted To: area.
13. Another screen will pop up and then click on the box under the To: column next to the church you selected.
14. Put the client's name in the subject.
15. Type in the information listed below in the email
16. Press send.

Your email should include:

- Client's name with correct spelling
- Contact information that she has given us permission to release: complete mailing address and/or living address, phone number and email address.
- Client's spiritual status (Made a profession of faith, prayed to rededicate, already a believer, etc.)
- Number of children and ages
- Client concerns: There is no need to review the details of the client's life to the Pastor or Church Liaison.
NOTE: Permission for you to share her phone number and address does not mean permission to share intimate details of her situation.

Please send each referral in an individual email, even if you have more than one going to the same church.

After the church referral is made, create a follow up in ekyros for that client and check on the referral the next week. A client advocate will be assigned to follow up with the church referrals on a weekly basis, and print out the response, and then place it in the client's file.