

Therapy referral and clinical handoff record

Original focused referral, receipt and response fields; no triage or consent wording. therapycrm.io

1. Focused referral summary

Referring role / date	Intended receiving service
Specific question and child-family priority	
Verified sharing authority / consent reference and permitted scope	
Relevant current findings / source / date / plan version	
Counts / denominator / access and response support / limits	
Unresolved question and requested consideration	
Current responsible clinician and operational follow-up owner	

Share only relevant permitted records through the approved route. Sending a summary does not transfer professional responsibility.

2. Receipt, actual response and follow-up

Sent date / approved route	Receipt date / evidence
Receiving service acknowledgement / contact role	
Actual acceptance / clarification / decline / other response	
Next action / owner / agreed review date	
Current-care responsibility while waiting	
Family communication / date / agreed next step	
Linked records / author / sign-off	
Receipt, acceptance and appointment are different states. Urgent concerns follow the clinician's established local pathway, not this form.	