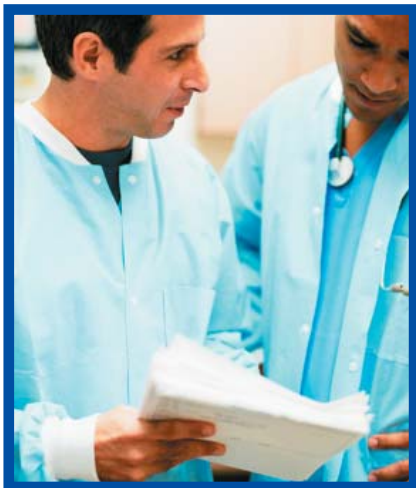


Repeated visits to primary referral sources are likely to be more successful than one-time contacts

Carl J. Dunst

Research on educational outreach to physicians points to those things practitioners can do to increase and sustain referrals to early intervention and preschool special education. What you can do to improve outreach to primary referral sources is described in this *Endpoints*.

Researchers at the Tracking, Referral and Assessment Center for Excellence recently examined 38 studies that investigated factors that make outreach to physicians and other primary referral sources likely to be most successful. Patricia Clow, Carl Dunst, Carol Trivette, and Deborah Hamby examined the studies to identify the characteristics of educational outreach that make this practice work.



The particular outreach practice constituting the focus of analysis was *academic detailing*. This outreach practice is characterized by brief, repeated, face-to-face, informal visits to physicians in their offices or other practice settings to provide information and materials to change prescribing behavior. This practice was examined because it seems especially useful for improving child find and increasing referrals to early intervention and preschool special education programs.

Findings showed that four sets of factors were most important if outreach was successful:

- Building rapport and establishing credibility with physicians and other primary referral sources.
- Highlighting and repeating a focused message about the benefits of making a referral to the physician and his/her patients.
- Using concise, graphic written materials that describe the services the physicians and children will receive.
- Making repeated follow-up visits to reinforce referrals, answer questions, and provide additional information.

Repeated follow-up visits were so important that if not done, the other factors didn't matter. What does this mean for improving child find?

Establish ongoing contact with primary referral sources.

Improving Child Find Practices

Outreach to physicians and other primary referral sources is more likely to be effective if certain things are done before, during, and after child find. The table shows the elements of planning, implementing, and following-up on contacts with physicians and other primary referral sources.

Planning

- ✓ **Identify your referral sources.** In small physician practices the physician is most likely to make referrals. In medium-size practices, nurses often make referrals for physicians. In large practices, referral specialists make referrals. Take the time to learn whom you should contact.
- ✓ **Prepare a clear message.** Physicians and other primary referral sources need a reason for making a referral. You should prepare a concise, clear message to build a case for referrals. The message should focus on what you offer and how it benefits the physician and the children being referred. Remember, less is more.
- ✓ **The messenger matters.** Your message is only as good as the person delivering the message. The messenger must come across as credible and deliver the message credibly. Assured, confident, and knowledgeable persons make the best messengers.
- ✓ **Prepare a concisely written brochure.** Providing physicians written materials about what you do and how it benefits the children being referred reinforces the orally delivered message. The brochure should be targeted to the audience. Generic brochures are not as effective.

Implementation

- ✓ **Planning the visit.** Take the time to find out when the physician is available to see you. You want to be able to make the visit without the need for an appointment. Physicians are often available first thing in the morning and during hours that patients are not scheduled.
- ✓ **Making the visit.** Ask to see the person(s) you have identified who make referrals. Introduce yourself, tell the person(s) the name of your program, explain the purpose of the visit, and deliver the message. Keep it short (less than five minutes).
- ✓ **Report and reinforce the message.** Immediately after delivering the message, give the physician copies of your brochures and explain what the brochure includes. Repeat the message in a manner that reinforces the reasons to make a referral.
- ✓ **Ask how you can help.** Ask if there is any other information the physician needs. Ask if there is anything you can do for the physician and any of his/her patients.
- ✓ **Thank the physician.** Thank the physician for taking the time to talk to you and explain how he/

she can contact you (business card) or your program (phone number on brochure).

Follow-up

- ✓ **Acknowledge the referral.** All referrals should be acknowledged immediately and include the steps that will be taken to respond to the physician's request.
- ✓ **Keep the physician informed.** Send the physician a short note telling him/her when an action is about to be taken for the child who was referred. Inform him/her of what will be done.
- ✓ **Provide feedback in a timely manner.** As soon as you know, inform the physician about the findings or results of the actions taken.
- ✓ **Make regularly scheduled follow-up visits.** Physicians are busy professionals. You need to plan and make regularly scheduled follow-up visits to keep the physician informed about individual children and to encourage additional referrals.

These characteristics were used in a pilot study for increasing referrals to an early intervention program. Findings showed that brief, focused visits of less than 10-15 minutes increased referrals by primary referral sources.

Table

Key Elements of Effective Outreach to Primary Referral Sources Practices

Planning

- ✓ Identify your referral sources
- ✓ Prepare a clear message about the benefits of making a referral
- ✓ Identify assured and credible messages
- ✓ Prepare a concise written brochure describing the benefits of a referral

Implementation

- ✓ Plan the visit carefully
- ✓ Make the visit and deliver the message
- ✓ Repeat and reinforce the message during the visit
- ✓ Ask how you can help
- ✓ Thank the primary referral source

Follow-up

- ✓ Acknowledge the referral
- ✓ Keep the physician informed
- ✓ Provide timely feedback
- ✓ Make regularly scheduled follow-up visits

The practices described in this *Endpoints* are based on findings reported in P. W. Clow, C. J. Dunst, C. M. Trivette, and D. W. Hamby (2005) Educational outreach (academic detailing) and physician prescribing practices. *Cornerstones*, 1(1), 1-19.