



Referral Letter Template

Before using this template, please ensure that you have obtained the client's consent and a signed release of information (ROI) form. This is critical for protecting the privacy and confidentiality of the client's personal details and ensuring compliance with relevant laws and agency regulations. Securing proper authorization helps facilitate the responsible use and handling of sensitive information throughout the referral process.

[Date]

Dear [Point of Contact],

I hope this letter finds you well. I am writing to refer [Client's Full Name] to [Organization or Program Name]. [Client's Name] has been receiving services at [Your Agency Name] for [Duration]; however, they would greatly benefit from the social services and support your organization provides.

[Briefly explain the reason for referral—this could include specific challenges the client is facing, such as homelessness, financial hardship, mental health issues, substance abuse, family issues, etc. You can mention any relevant details while respecting the client's privacy and confidentiality.]

Given [Client's Name]'s current circumstances, I believe they would benefit from your [specific services or programs], which can offer essential support. I have discussed this plan with [Client's Name], and they are fully aware and in agreement with this referral to your agency.

Please feel free to contact me at [Your Phone Number] or via email at [Your Email Address] if you need any additional information or clarification regarding this referral. I look forward to your prompt attention to this matter and am happy to help facilitate the process.

Thank you for your time and consideration.

Sincerely,
[Your Name]
[Your Job Title]
[Your Organization]

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