

Checklist: Health Care and Service Provider Collaboration

This checklist is designed to support refugee service providers in collaborating with health care providers to facilitate newcomers' health care access. It is meant as a starting point, not a comprehensive list. Feel free to change or add items as necessary. Note that this checklist is not a compliance tool for any specific grant or program; always reference your grant agreement and terms for specific program requirements. For more detailed tips, view the Switchboard guide [Service and Health Care Provider Collaboration](#). This checklist was created in partnership with the Society of Refugee Healthcare Providers.

Action Needed for Partnership with [Name of Health Care Partner]	Completed? (Yes/No)	Needs follow up? (Yes/No)
Roles, Foundations, and Communication		
At the start of each partnership, hold a meeting with the health care provider partner to review and agree on the partnership's scope/purpose, partner roles, and referral process		
Develop a memorandum of understanding (MOU) between your agency and the health care provider that outlines: <ul style="list-style-type: none"> • Roles and responsibilities • Confidentiality and privacy of client information • Client consent procedures • Data and information-sharing protocols and secure platforms to be used 		
Designate a champion (point person) at your agency		
Designate a champion (point person) at the health care provider site		
Exchange direct contact information for champions and identify backup contacts		
Create a one-page "Who Does What" document or shared responsibility matrix listing relevant tasks for service and health care provider teams to reference		
Develop a written referral protocol outlining routine, urgent, and emergency communication pathways, including: <ul style="list-style-type: none"> • Who are the staff members on both sides who handle routine scheduling? 		

Action Needed for Partnership with [Name of Health Care Partner]	Completed? (Yes/No)	Needs follow up? (Yes/No)
<ul style="list-style-type: none"> • What are the expected timelines for responses from both sides? • What are the after-hours communications options and contacts, if available and necessary? • How to elevate and address urgent medical needs? • How will medical and mental health crises/emergencies be addressed? 		
Create shared tracking tools for referrals and follow-up appointments		
Hold regularly scheduled meetings with key members from both sites to review: <ul style="list-style-type: none"> • Shared goals • Successes and challenges of the collaboration • Client attendance rates • Referral barriers • Whether any changes should be made to streamline the partnership/referral process 		
Resource Sharing and Leveraging		
Identify if there are staff who can share or complement roles between the two sites (e.g., a patient advocate at a clinic who can assist clients with arranging medical appointments)		
Explore if your agency has community interpreters who could complete medical interpreter training and support the health care provider with communication needs (for reimbursement)		
Identify, co-develop or adapt educational resources (e.g., translate health information pamphlets from the health care provider into clients' preferred languages). Check Switchboard , Society of Refugee Healthcare Providers , and Minnesota Center of Excellence websites for existing educational resources first to save time.		
Maintain a shared resource list that includes support groups, services, and physical space		
Brainstorm health initiatives to collaborate on that meet a community-identified need (e.g., vaccine clinics)		
Conduct reciprocal cross-trainings between staff from both sites (e.g., refugee health 101, interpretation and translation, trauma-informed care, culturally responsive care, confidentiality)		
Maintain an updated directory of refugee-knowledgeable health care providers. You can download a template here .		

Follow-up Notes

If any actions require follow-up, make notes here of next steps or information needed to complete the action.

Signature of employee completing checklist

Date

Print name

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