

Referral essentials checklist

Essential components of successful referrals

✓ 1. Screen and assess

- Identify client health risks and determine your client needs.
- Screen your clients using nationally recognised pre-exercise screening methods.

🔗 [APSS Textbook](#)

🔗 [APSS Tool](#)

✓ 2. Evaluate

- Know your scope of practice and duty of care.
- Determine whether your scope of practice meets your client needs or whether you require guidance from a medical or allied health professional.

🔗 [Scope of practice](#)

🔗 [APSS Textbook](#)

🔗 [APSS Tool](#)

✓ 3. Decide

- Ask yourself some key questions in order to determine how to manage your client's needs.
- Decide what expertise you need to develop your client's exercise program and support them to achieve long term commitment to exercise.

🔗 [Scope of practice](#)

🔗 [Exercise and health referral networks](#)

✓ 4. Prepare

- Compile relevant, accurate and concise information for the referral.
- Use systematic processes, ensure information delivery is timely and understand health practitioner information requirements.

🔗 [Letter templates](#)

🔗 [Exercise and health referral networks](#)

🔗 [Confidentiality and privacy](#)

✓ 5. Consent

- Involve your client in the process, ensure they are informed and gain consent to share their health information.

🔗 [Letter templates](#)

🔗 [Confidentiality and privacy](#)

✓ 6. Connect

- Plan ahead and understand the expectations of medical or allied health professionals.
- Take appropriate, professional and effective referral actions: make a professional introduction; understand health professional needs and expectations; develop trust; be responsive.

🔗 [Letter templates](#)

🔗 [Exercise and health referral networks](#)

✓ Exercise program delivered under health professional guidance

✓ 7. Commit

- Commit to ongoing dialogue to provide feedback about the referral and achieve a positive health outcome for your client.

🔗 [Letter templates](#)

🔗 [Reporting template](#)

🔗 [Exercise and health referral networks](#)