

**YORK REGION**  
**INTAKE NETWORK**  
**WARM TRANSFER PROTOCOL**

**Streamlining Intake, Referral and Assistance**

**INTRODUCTION**

*Warm Transfer Definition:* Simultaneous<sup>1</sup> transfer of a telephone call and its associated data/information from one worker to another worker or supervisor for the purpose of supporting the caller and ensuring caller lands with the right service.

*Assumption:* For many individuals who call for help, that first call takes courage and is often motivated by a significant current life situation. In the majority of circumstances, if the caller is provided with other telephone numbers to call, they may be challenged to continue their search due to a multitude of factors not the least of which is being overwhelmed or previous unsuccessful attempts to find services. For others if they felt comfortable pursuing the other options themselves, may still be open for a follow up and check in to ensure that they “landed” somewhere.

To honour and support the caller when they have called a service that happens to not be the most appropriate to meet their need, a warm transfer provides a seamless connection to that “other” more appropriate service and tightens the safety net.

*Purpose:*

The purpose of this protocol is three fold:

1. To support families seeking services with enhanced navigation support at the front door;
2. To better understand the viability of Warm Transfers as a new practice across all child, youth, family serving organizations in York;
3. To continue to assess the degree to which warm transfers contribute to streamlining of Intake, Referral and Assistance between all services participating in the Intake Network.

*Process:*

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<sup>1</sup> This is the ideal as in most organizations the Intake staff may be on the phone with other clients, or away from their desks making simultaneous transfers impossible. This is particularly so for organizations that don't have dedicated Intake staff. Consequently, for most situations the Warm Transfer will consist of a phone call to the second organization after the fact with the verbal consent of the client

If the screener finds that the caller would prefer to participate in a warm transfer then with a verbal consent, information gathered by the screener will be forwarded to the other entity either via fax, e-mail, or direct phone call. Only the necessary information to provide seamless services will be shared. In order to preserve confidentiality, if information is forwarded via fax, a phone call is necessary to notify the receiving person that information is being transmitted. E-mail will only be used between those agencies enrolled in secure email eg ONE Mail or the email may be sent with a password by separate email, or an email may be sent without identifying information.

Should a simultaneous opportunity be possible, the referring screener can share information over the phone prior to transferring the call. A true warm transfer also allows for all three parties to be on the line at the same time, if needed.

The four current options that make up the **Protocol** include:

1. True warm transfer- call direct and engage in three way conversation;
2. Typical warm transfer - call the other entity and if not available, leave a message to either arrange for a convenient time to talk, or advise that the information will be sent by fax or e-mail. After connecting with the second service, the first screener will then follow up within agreed upon time and call caller to ensure that second service connected with them;
3. Call and set up a future 3 way appointment and coordinate;
4. Provide the caller with information and contact info and agree on a follow up call to ensure caller was able to reach the other service(s).

**The Verbal consent will be documented in each case.**

*Intake Network:*

This is an initiative of the Intake Network who will continue to collectively participate in the evolution of the practice of "Warm Transfers" and report to the Mental Health Collaborative regarding its application in York region.

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