

Tulsa Resource Hub – Case Manager Referral Form

Purpose:

This form is to be completed by case managers, social workers, school staff, or partnering agencies referring an individual or family for assistance through Tulsa Resource Hub.

SECTION 1 — Referring Case Manager / Agency Information

Agency Name: _____

Case Manager Name: _____

Phone Number: _____

Email: _____

Preferred Contact Method:

☐ Phone ☐ Email

SECTION 2 — Client Information

Client Name: _____

Parent/Guardian Name (if applicable): _____

Phone Number: _____

Email (optional): _____

Preferred Contact Method:

☐ Phone ☐ Text ☐ Email

Address / City: _____

Household Size: _____

of Children & Ages (if applicable): _____

SECTION 3 — Services Requested

Check all that apply:

Basic Needs

- ☐ Food Assistance
- ☐ Hygiene Items
- ☐ Baby Supplies (diapers, wipes, formula)
- ☐ Clothing
- ☐ Household Items

Financial / Crisis Support

- ☐ Rent Assistance Resources
- ☐ Utility Assistance Resources
- ☐ Motel Resources / Emergency Shelter
- ☐ Transportation Assistance
- ☐ Special Needs / Disability Support Resources
- ☐ Holiday Assistance

Other Needs

(Explain) _____

SECTION 4 — Summary of Situation

Brief description of the client's needs or situation:

SECTION 5 — Documentation (Optional)

Case managers may upload or provide:

- Release of information
- Case notes
- Proof of crisis need
- Any documents that may help TRH assist efficiently

(Attach separately or email to Tulsa Resource Hub.)

SECTION 6 — Safety, Risk, or Urgent Needs

Is the client in immediate crisis?

☐ Yes ☐ No

If yes, describe: _____

Are there any safety concerns we should be aware of?

☐ Yes ☐ No

If yes, describe: _____

SECTION 7 — Best Time to Contact Client

☐ Morning ☐ Afternoon ☐ Evening

Notes: _____

SECTION 8 — Case Manager Verification

I certify that I have obtained permission from the client to share their information with Tulsa Resource Hub.

Name: _____

Signature / E-Signature: _____

Date: ____ / ____ / ____