

# CCP Referral FAQ & Help



## When should I use the CCP referral process?

1. Our CCP contract is a “referral only” plan and is not open to any members of the congregation without prior approval from authorized church representative(s).
2. Our CCP contract is a traditional plan open to all congregation members but an authorized church representative needs to approve additional sessions (beyond the individual sessions allowed by plan) for a specific member of the congregation.

## Help making a Congregational Care Referral:

1. Go to <https://pastoralinstitute.org> and find “OUR PROGRAMS & SERVICES” at the top of the page; select “Congregational Care Program (CCP).”
2. Scroll down to “CCP Client Referral Resources” and click the button for “Online Referral Request.”
3. Under “Referral Source”, select “CCP Partner.”
4. Provide all the required information indicated by red asterisks (\*).
5. Under “Authorized Representative”, enter the clergy or staff member making the referral.
6. Under “# of Approved Sessions”, specify the number of sessions you are agreeing to cover/pay for at the approved CCP contract rate for this client referral.
7. Under Reason for Appointment, select the closest reason for the referral.
8. Patient Contact Details – NOTE: Much of this is patient information you may need to get ahead of time from the church member you’re referring.
9. Ignore Patient Insurance
10. Appointment Preferences – Enter the preferred day and time if known. If not, leave blank and our intake team will address this with the client.
11. VERY IMPORTANT. Enter specific concerns which led to your referral of the patient.
12. Release of Information – Click “YES” with \*\*\*IMPORTANT NOTE\*\*\* below.
13. Click “Submit Request.”
14. Our intake team will contact your church member as quickly as possible.

### \*\*\*IMPORTANT NOTE\*\*\*

## A Referral **MUST** be accompanied by a Release of Information **SIGNED BY CLIENT and WITNESS to be processed.**

1. Go to <https://pastoralinstitute.org> and find “OUR PROGRAMS & SERVICES” at the top of the page; select “Congregational Care Program (CCP).”
2. Scroll down to “CCP Client Referral Resources” and click either the button for “Print & Complete PDF” or “Fillable PDF”
3. Fax **SIGNED & WITNESSED** Release of Information to **888-863-0376**.