

# Appendix G — Partner Handoff Agreement

Joe Gleason · Advance review draft 3.7 — October 2026

## Transfer a defined responsibility—not just a message

**Use with:** Chapters 5, 7, and 12.

This is an operational planning aid, not a substitute for contracts or appropriate professional and privacy review. Start with one recurring handoff and the relevant people on both sides. The source template specifies purpose, permitted information, status, responsibility, response, fallback, and closeout.

### G1. The partner agreement

| Field                                | What the partners agree                                                                                      |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <b>Shared purpose and scope</b>      | What the person wants help with, what each organization provides, and what falls outside the arrangement.    |
| <b>Fit and availability</b>          | What eligibility, assistance, capacity, timing, and costs must be verified for an individual request.        |
| <b>Named contacts</b>                | Responsible people on each side, contact methods, hours, and absence coverage.                               |
| <b>Information and authorization</b> | What needs to travel, why, who may receive it, the approved route, and the relevant authorization.           |
| <b>Acceptance</b>                    | The event confirming that the receiving service has accepted a defined next action.                          |
| <b>Response expectations</b>         | Agreed timing for acknowledgment, a substantive response, and an update when the request remains unresolved. |
| <b>Delivery confirmation</b>         | What establishes that the conversation, assessment, journey, visit, or other agreed service occurred.        |

| Field                       | What the partners agree                                                                                     |
|-----------------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Change or failure</b>    | Who acts after silence, cancellation, refusal, lack of capacity, or a changed preference.                   |
| <b>Urgent concerns</b>      | The separate approved clinical or urgent route; ordinary referral queues do not replace it.                 |
| <b>Family communication</b> | Who tells the person what happened, through their chosen route, and who answers the next question.          |
| <b>Resources and review</b> | Staffing, coordination time, costs, responsibilities, and when the partners examine recurring difficulties. |

Agree who tracks the request before acceptance and who follows the accepted action afterward. A coordinator's role does not make them responsible for everything another service provides.

## G2. One-request handoff record

**Record the request and date; receiving contact; information permitted to travel; acknowledgment; accepted action; scheduled event; delivered service and confirming source; remaining need; next owner; and the update given to the person.**

Use R8's status language. "Received" is not "accepted." "Scheduled" is not "delivered." A provider can answer promptly that it has no capacity while the person's need remains unresolved.

Suggested wording for an incomplete arrangement:

We have [verified status]. We have not yet confirmed [outstanding part]. [Named person] is checking [next action] and will contact you through [agreed route] by [agreed time]. Your appropriate contact before then is [verified contact].

Use that wording only after someone accepts the commitment. Keep related needs—such as the visit and the journey—separately confirmed when different providers own them.

**Decision this tool supports:** Does the person receive a responsible response while the partners establish what help is actually available?