



PC Policy # 13 B: **Yielding and Referring**

Policy Title: Referring

Purpose: *To ensure Peer Counselors (PC) provide timely, accurate, and appropriate referrals that support the health, nutrition, and well-being of WIC participants. This policy establishes clear procedures for identifying participant needs, connecting families with a higher level of lactation care and relevant healthcare and community resources, and strengthening information exchange between WIC and partner organizations. The goal is to promote coordinated care, reduce barriers to services, and enhance the overall participant experience.*

1. Situations Requiring Referral

PCs must refer to a PC Designated Breastfeeding Expert (DBE), WIC clinic DBE, or other qualified professional when a WIC participant expresses concerns found on [PC Policy #13A Yielding and Referring](#) (When to Yield)

Additional Referral Issues

- The WIC participant is unable to follow PC recommendations
- The PC is unsure on how to proceed
- Issues that fall outside of basic breastfeeding support.
- Issues fall outside PC scope of practice
 - Refer to [PC Policy #17: WIC Peer Counseling Scope of Practice](#)

2. Types of Referrals

PCs are a part of the [WIC Breastfeeding Team](#), who collaborate to support WIC participants through their breastfeeding journey. The Breastfeeding Team provides education, resources, and personalized assistance to help WIC participants achieve their breastfeeding goals.

PC may make referrals to the following, but not limited to:

- WIC Nutritionist-for nutrition questions, growth concerns, food package and breastpump needs.
- WIC clinic- for WIC clinic appointments, height and weight check appointments.
- PC DBE- for complex breastfeeding concerns that require advanced lactation expertise.



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- WIC clinic DBEs - for complex breastfeeding concerns that require advanced lactation expertise.

Referral Communication Examples:

- **WIC Nutritionist referral:** *"I know your nutritionist can help us out. Keep that WIC appointment."*
- **PC DBE or WIC clinic DBE referral:** *"I want to make sure your concerns are addressed. Some of this goes beyond what I can help with as a PC, so I'm going to refer you to our PC DBE for this breastfeeding issue. I will still provide PC services, but the DBE is specialized in more complex breastfeeding issues. Do you think this will be helpful for you?"*
- **Community services referral:** *"Here are some programs that you might find helpful."* (PC must work with the Team Leader (TL) or WIC clinic to get a list of local community programs) also, see NMWIC website
- **When the PC is not sure:** *"I don't have that information but let me get back to you with the answer or where to start."* (Reach out to your LPCC if you need any assistance with referrals.)

3. Referral Process to a PC DBE:

Initiating a Referral:

The PC must complete the following steps when initiating a referral to a PC DBE:

- **Identify if the PC DBE is on call.**
 - The PC must review the [PC & WIC DBE calendar](#) to confirm if the PC DBE is scheduled to be on call on the date the referral will be submitted.
 - If the PC DBE is not scheduled but a WIC DBE is on-call, refer to the section below titled "Referral Process to a WIC DBE."
- **Complete the PC DBE referral form.**
 - This is located in the Google Workspace. [PC DBE referral form](#)
- **Submit the completed referral form**



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- By emailing pcdbe@nmwic.org. This group email notifies all PC DBEs that a referral has been submitted

- **PC DBE Assignment:**

- PC DBE will accept the referral.
- If multiple PC DBEs are available, the PC DBE team will determine which PC DBE is able to accept the referral.

- **Notification of Assignment:**

- The DBE who accepts the referral must email the referring PC within 48 hours.

4. Referral Process For a PC DBE

PC DBE Responsibilities:

Client Intake and Counseling

When a referral is assigned, the PC DBE must complete the following activities:

- **Monitor Referrals**

- The PC DBEs must review the referral spreadsheet and the “PC DBE” group email at least once every 24 hours to identify new referrals.

- **Conduct the Client Intake and Assessment**

- The PC DBE must complete an intake assessment with the client based on the concerns identified in the referral.

- **Provide Counseling**

- Based on the assessment, the PC DBE must provide appropriate breastfeeding counseling and guidance to address the clients concerns.

- **Document the Care Plan**



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- The PC DBE must complete the **DBE Care Plan Form**, which includes:
 - A summary of the assessment
 - Counseling provided to the client
 - Recommendations for the PC to work with the WIC participant on.

- **Share Relevant Information with the PC, TL or other WIC clinic staff**

- The PC DBE must provide the PC with a copy of the **Peer Counselor Section** of the Care Plan to ensure continuity of care.
- Coordinate care with TL or other WIC clinic staff for client needs.

4. Referral Process to a WIC Staff DBE

The PC must complete the following steps when initiating a referral to a WIC Staff DBE:

- **Identify the On-Call WIC Clinic DBE**

- The PC must check the [PC & WIC DBE calendar](#) to determine which WIC staff DBE is on call.

- **Access the Referral Form**

- The PC must locate the [Green Google sheet: "WIC DBE Referral Form"](#) in the *Counseling Documents (Active/Open) folder*.
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- **Complete the Referral Form**

- Make a copy of the referral form
- The PC is required to complete all fields thoroughly. Providing a detailed and comprehensive referral is essential to ensure the WIC DBE clearly understands the breastfeeding concerns the client is experiencing, especially since WIC clinic staff do not have access to the Google Workspace

- **Save to the Client Folder**

- Move the completed form into the clients folder
- Rename the file using the following format: **WIC DBE Referral- Client Initials**



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- **Update Sharing Permissions**

- Select **Share** → **Anyone with the link** → **Viewer**

- **Send the Referral Notification Email**

- The PC must email the referral link to the following individuals:
 - Main DBE
 - Backup DBE
 - WIC PC Manager
 - WIC Breastfeeding Manager

- **Ensure Email Security**

- The referral email must be encrypted prior to sending. See [PC Policy #11B-Communication](#) for guidance on how to send encrypted emails