

**Medical Department**  
**Process for Tracking Referrals**

<b>Site:</b>	<b>Version: 1</b>
<b>Approver(s): Medical Clinical Staff</b>	<b>Date Revised: March 21, 2017</b>
<b>Effective Date: 01/13/17</b>	<b>Next Review Date:</b>
<b>Standards: NCQA</b>	

**Purpose**

Patients at \_\_\_\_\_ may need to see a range of specialty providers outside of the clinic. We give specialty providers necessary information about the patient to be treated appropriately. We ensure that we receive results/reports/notes from the referring specialist to ensure coordination and quality of care for our patients.

1. Referral is ordered through the Electronic Health Record (EHR) as a “Consult”. Referrals can be ordered by a nurse but they must be electronically signed by the provider.
2. Health Information Management (HIM) Staff and Purchased and Referred Care (PRC) staff will get an EHR notification that a new referral has been placed.
  - a. PRC Staff will add a comment on the referral stating if it has been approved, denied or deferred.
  - b. HIM Staff will fax referrals and supporting documentation

**Highlighted sections: Meets CC 04**

<p><b>Referrals contain:</b></p> <ul style="list-style-type: none"> <li>• Diagnosis</li> <li>• Demographic information (name, sex, date of birth, phone number, address, insurance)</li> <li>• Type of referral</li> <li>• Priority level</li> <li>• Length of referral</li> <li>• Clinical questions</li> </ul>	<p><b>Supporting records include but are not limited to:</b></p> <ul style="list-style-type: none"> <li>• Progress notes</li> <li>• Medication list</li> <li>• Lab results</li> <li>• Imaging reports</li> <li>• Care plan</li> </ul>
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3. The following high risk referrals will be tracked:

Meets CC 04

- a. Cardiology
- b. Infectious Disease
- c. Neurology
- d. Pulmonology
- e. Surgery

4. Jamie will run a report of all high risk referrals every 2 weeks.

5. Jamie will perform a chart review on each patient.

- a. If a report has received and is scanned into Vista, she will close the referral.
- b. If there is no report, she will contact the specialist, via a phone call or a fax request, 2 weeks after the referral was made in EHR.
  - i. If patient has been scheduled, follow-up (phone call or fax request) will take place 2 weeks after the appointment date.
  - ii. If patient could not be contacted to schedule an appointment, this will be added as a comment on the referral in EHR and a notification will be automatically sent to the ordering provider. The referral will be closed.
  - iii. Follow up (phone call or fax request) will be done at 2 week intervals until report is received. If a report has not been received or the patient has not scheduled after 3 follow up attempts, then this will be added as a comment on the referral in EHR and a notification will be automatically sent to the ordering provider. The referral will be closed. An excel spreadsheet will be utilized to track the follow up attempts.

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6. To close a referral: Click on Action, Consult Tracking then Administrative Complete