

Practice Policy & Guidelines

Policy: Referral Tracking	Developed by:	Approved by:
Updated:	Signature:	Signature:

PURPOSE:

To ensure coordination of care with specialists.

SCOPE:

Use the electronic health record (EHR) to note and track referrals to specialists and follow-up with families to coordinate quality care.

RESPONSIBILITY:

Physicians and staff

DETAILS:

Physicians (or their designee when appropriate) will document any referral to a specialist within the referral section of the medical record. Staff will document any additional referrals that come by way of patient/family request with physician input. All referrals will contain demographic data, appropriate indication of whether insurance company referral approval is necessary and obtained, the specialist or group to whom the patient has been referred, the reason for referral including ICD-10 coding and any additional pertinent clinical information. The referral will be given an appropriate flag date as to when a report back from the specialist will be expected.

Physicians will be responsible for electronically adding any additional pertinent data reports that the patient should take with them to the specialist visit (labs, growth charts, diagnostic problem derived patient medical record reporting, etc).

All reports received from the specialist will be saved to the medical report under the referral tab and linked to pending referral to be fulfilled.

The referral tracking supervisor will be responsible for monitoring the referral tracking center of the medical record. For any referral which has passed its flag date and does not have a fulfilled report, the patient/family will be contacted and documentation placed into the referral notes. If patients did see the specialist, a verbal report will be obtained from the patient and the referral tracking supervisor will contact the specialist's office for an official report. If a family did not go, a reason shall be obtained and this shall be reviewed with the ordering physician. If a patient does not return communication with the office, a template letter will be sent asking for additional information.

MONITORING:

The Quality Manager will spot check/audit the referral tabs periodically (at least once per quarter) to make sure that all outstanding referrals which have passed the flag date are being dealt with appropriately.

This policy shall be reviewed at least every 2 years.

Approved Date: ____/____/____

APPROVALS:

Physician Partner: _____

Date: ____/____/____

Administrative Partner: _____

Date: ____/____/____

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