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

Referrals contain:
- Diagnosis
- Demographic information (name, sex, date of birth, phone number, address, insurance)
- Type of referral
- Priority level
- Length of referral
- Clinical questions

Supporting records include but are not limited to:
- Progress notes
- Medication list
- Lab results
- Imaging reports
- Care plan
3. **The following high risk referrals will be tracked:**
   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.

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