Referral Management
CP3 Toolkit: Planned Care

The activities below describe the process to manage referrals. They were adapted from a September 21, 2016 presentation by Carolyn Shepherd, formerly of Clinica Family Health.

1. Define goals of referral management
   - Assume accountability
   - Provide patient support
   - Build relationships and agreements
   - Develop connectivity

2. Select and train staff to track and manage referrals
   - Select referral coordinator
   - Develop referral tracking system
   - Help patients identify sources of service and make appointments
   - Ensures transfer of information
   - Design standardized referral entry in EHR
   - Track referrals
   - Work with CMO to develop outside referral guidelines

3. Develop workflows to optimize internal referrals

4. Reach out to specialists, hospitals and community agencies
   - Primary care leader role
   - Address specialist’s legitimate concerns
   - Agreements in writing or incorporated into e-referral systems.

5. Create workflows to ensure the referral loop gets closed
   - Provider
   - Patient and family

6. Develop standard ways of exchanging information
   - Streamline data entry
   - Address complaints from both PCPs and specialists focus on communication
   - Standardized formats increase provider satisfaction
     - Shared EMR
     - E-referral
     - Structured referral forms
7. Support patients
   - Review patient’s intentions
   - Help patients identify sources of service
   - Help make appointments
   - Track referrals—help resolve problems
   - Ensure transfer of information

8. Communicate test results and care plans to patients/families