Resource Guide

Subject:	Referral Process Flow Information
Facility Site Review Source:	Department of Health Care Services (DHCS) All Plan Letter 20-006, Site Reviews: Facility Site Review and Medical Record Review or any superseding APL
Relevant Law/Standard:	
Agency//Organization Source:	
Agency/Organization URL	

Background:

An organized, timely referral system is clear for making and tracking referrals, reviewing reports, providing/scheduling follow-up care and filing reports in medical records. Referral informational resources are readily available for use by site personnel. Site staff can demonstrate (e.g., "walk through") the office referral process from beginning to end.

Purpose:

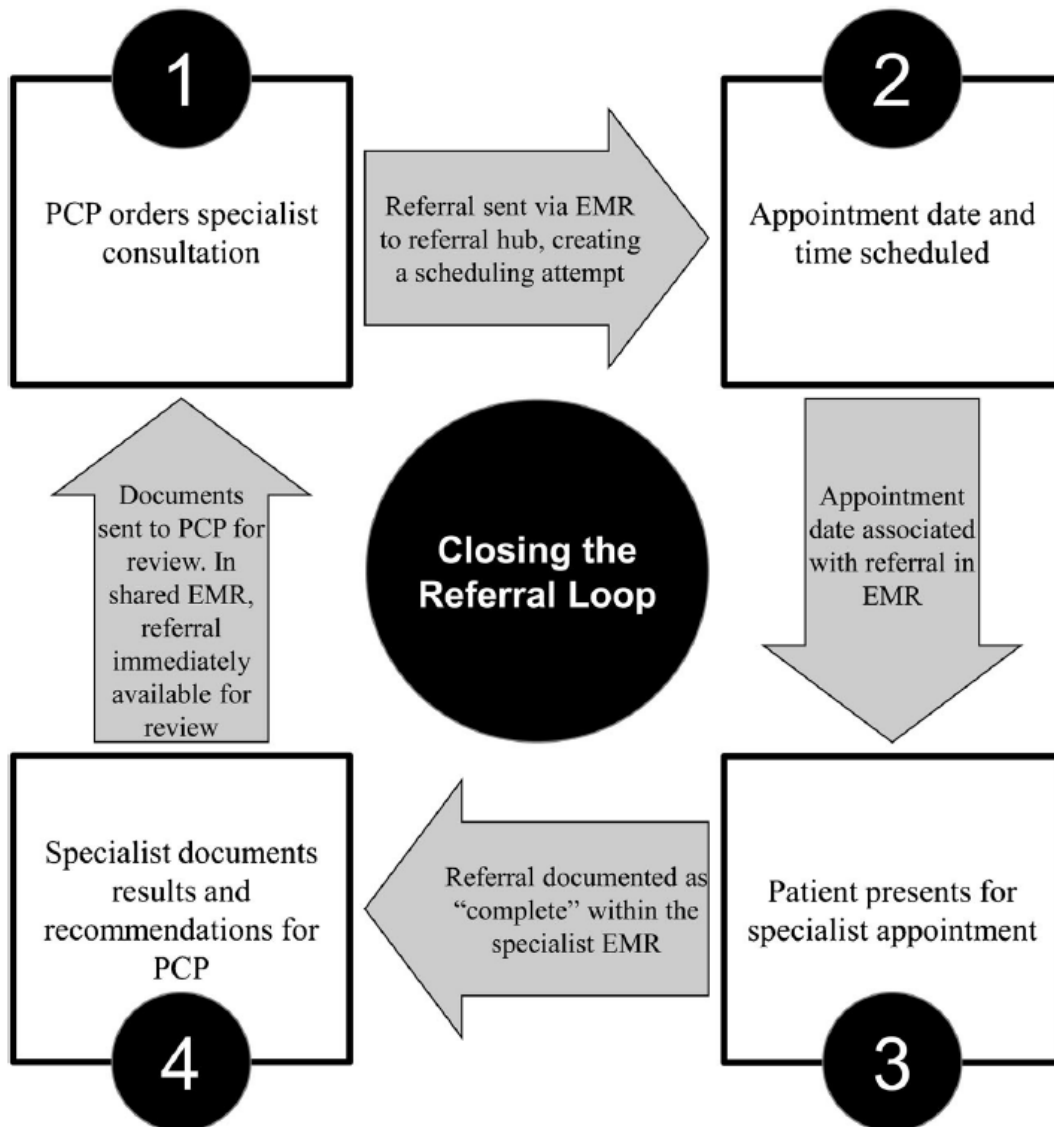Procedures for timely referral/ consultative services are established on site.

Requirements:

- Evidence of review may include the practitioner's initials or signature on the report, notation in the progress notes, or other site-specific method of documenting practitioner review.
- Electronically maintained medical reports must show evidence of practitioner review.
- Evidence of practitioner review on any page of the report(s) or diagnostic result(s) that have multiple pages is acceptable.
- Evidence of explicit notation in the medical record or separate system of referral tracking, including attempts to contact the member/guardian, as indicated.

Resource:

- Agency for Healthcare Research and Quality (AHRQ), Make Referrals Easy
  - https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlittoolkit2_tool21.pdf

Source: Patel, M. P., Schettini, P., O'Leary, C. P., Bosworth, H. B., Anderson, J. B., & Shah, K. P. (2018). Closing the referral loop: an analysis of primary care referrals to specialists in a large health system. Journal of general internal medicine, 33(5), 715-721.