



Resource Guide – Referral Process Information

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| Subject: | Referral Process Flow Information |
| Facility Site Review Source: | Site Review Survey, III. Office Management Standards, E. Procedures for timely referral/ consultative services are established on site. Medical Record Review, III. Coordination/Continuity of Care Criteria, F., G., There is evidence of practitioner <u>review</u> and/or <u>follow-up</u> of referrals made, when appropriate. |
| Relevant Law/Standard: | |
| Agency//Organization Source: | Department of Health Care Services (DHCS) All Plan Letter 20-006, Site Reviews: Facility Site Review and Medical Record Review |
| Agency/Organization URL | |

Background:

An organized, timely referral system is clearly evident 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.

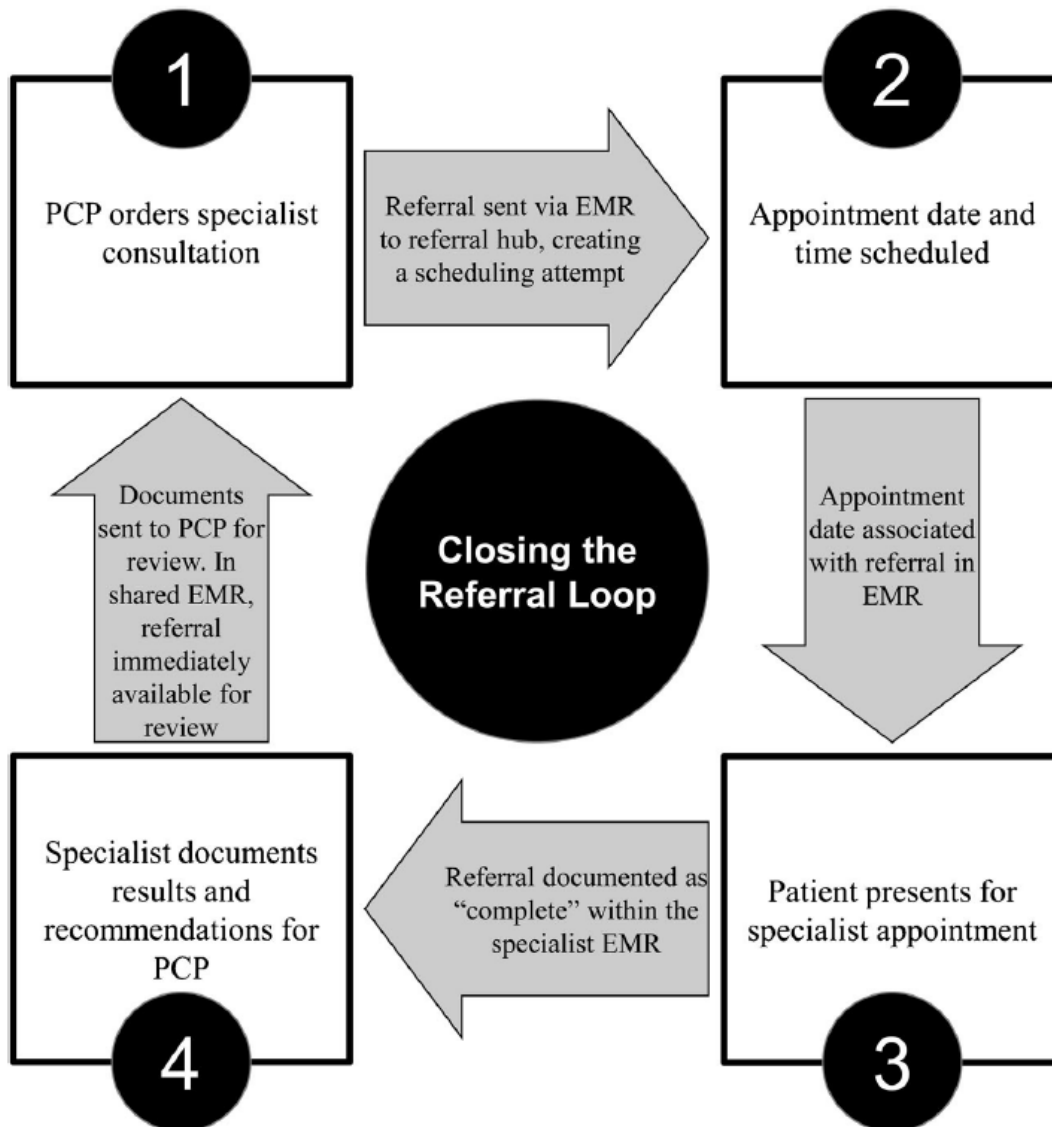
Purpose:

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.

Closing the Referral Loop



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.

Resources:

Agency for Healthcare Research and Quality (AHRQ), [Make Referrals Easy](#) (Also available in SFHP FSR library as pdf)

https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlittoolkit2_tool21.pdf

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