



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