***Practice Name:***

**Address:**

**Process and Procedure for Referrals to outside consultants and specialists**

Policy Effective Date: 4/3/2017

Practice Name uses the following criteria, policies and procedures for all referrals to outside specialists and consultants as it relates to patient care:

1. Use EMR NAME to generate referral electronically, whenever possible. If the receiving provider does not have the capability to receive the referral electronically, generate a written copy of referral. CC-21C
2. Use the EMR (EMR NAME) to relay patient information electronically, whenever possible. If the receiving provider does not have the capability to receive the referral electronically, generate any written information as requested by the provider. CC-21C
3. Include the following statement at the bottom of the referral -- “In referring this patient to your care, our office expects in return a full report regarding our patient’s visit within 7 days of the appointment. Additionally, please send any documentation regarding your diagnosis and any tests, labs, or imaging you deem appropriate. PCP will follow any treatment recommendations.” CC-08, CC-09
4. Include with the referral the type of referral, the timing of the referral and the reason for the referral. We consider the following types and referral timing: CC-04A, CC-04B
   1. Routine – Within 2 week
   2. Urgent – Within 3 days
   3. Emergent – Within 24 hours
5. Any referrals outside of the timeframe in section 4 are considered overdue. Completed referrals are brought to the attention of the clinician for their review, as well as a list of the overdue referrals. CC-04C
6. Include with the referral any necessary information related to the patient’s condition, including labs and imaging results, as well as any other relevant information. CC-04B
7. At least 3 times per week, assigned staff member will review the log in Excel for Referrals. Referrals are sorted by date and specialty in order to expedite follow up. Any referrals for which we have not received any information from the provider will be followed up by a telephone call the same day. If the patient did not see the provider in the time allocated, the patient will be followed up with a phone call the same day. CC-04C
8. At each patient visit, as per our examination protocol, our provider will ascertain if the patient has seen an outside provider since the patient was last seen at our office. If the answer to this question is “yes”, we will refer to the follow up procedure as outlined in section 7.