

Approved By:	Board of Directors	Adopted Date:	4/13
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Category:	Information Management	Reviewed Date(s):	7/19

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#### PURPOSE:

To ensure that patient referrals for specialist services are tracked, patients are notified of their result, and that referral results are appropriately followed up.

#### DEFINITIONS:

**Abnormal Referral Result:** Referral result that requires the ordering provider's attention as soon as possible but is not as urgent or life-threatening as critical result

**Critical Referral Result:** Referral result for a condition that if left untreated may be life-threatening or place the patient at serious risk. Patients require urgent clinical attention

**Critical Referrals:** Referrals that require immediate notification of results, whether critical, abnormal, or normal (e.g., suspected or confirmed cancer)

**Normal Referral Result:** Referral result that falls within the normal parameters for the particular referral (For the purpose of this policy, referral results DO NOT include imaging results ordered in the electronic health record)

**Ordering Provider:** The provider who initiated a referral for a particular patient

**Specialist Provider:** A provider or facility who received a referral for services from an ordering provider

**Surrogate Provider:** A provider designated to act on referral results on behalf of the ordering provider if the ordering provider is unavailable

#### POLICY:

All referrals for specialist services are documented and tracked in the electronic health record. Referral results (consultation and other reports, diagnostic test results) are reviewed, signed, and saved according to standardized protocols.

Referral results are routed to the ordering provider, or a surrogate provider if the ordering provider is unavailable, within a period of time that allows prompt clinical action to be taken.

The ordering provider or surrogate communicates abnormal referral results as appropriate to ensure patients are active participants in their healthcare. Patients are notified of their referral results via office visit, telephone, mail, or MyChart patient portal. Notifications are documented in EPIC.

All referrals (except those for physical therapy, occupational therapy, speech therapy, and cosmetic procedures) will be tracked unless the ordering provider indicates no follow-up is needed.

#### Responsibility

Ordering and surrogate providers are responsible for:

- Reviewing, signing, and acting on all referral results they have ordered.
- Notifying patients of their results, or delegating care team staff to do so.
- Developing an evidence-based treatment plan with the patient as needed.
- Updating the patient's problem list as appropriate.

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Referral staff are responsible for:

- Processing referrals and following up as needed per the Referrals Tracking Workflow.

Medical Records or other designated staff are responsible for:

- Processing referral reports according to the Medical Records Workflow.

**REFERENCES:**

None

**ASSOCIATED DOCUMENTS:**

*ODCHC Policy CLN.008 Referral Tracking (Retired)*

*Referrals Tracking Workflow*

*Medical Records Workflow*

**KEYWORD TAGS:**

None