

Project Charter

Project Description / Purpose

Project Name:	<i>Implementing a new referral process</i>
Clinic:	<i>Kids and Family Kare</i>
Process:	<i>The provider will request referrals for a patient and send the task to a medical assistant. The Medical assistant will then look for a specialist near the patient's home that accepts patient insurance. Once the referral is made and faxed to the specialist office, the patient will receive a call from the medical assistant to share this information. In a week, the medical assistant will contact the patient again and make sure the appointment has been made with a specialist.</i>
TIP 2.0 Process Milestone:	<i>Referrals</i>
Project Description / Purpose	
<i>This new referral process will help us create better communication between the patients and ensure they are receiving proper care.</i>	

Project Overview

Problem Summary:	<i>With our current referral process, after the referral is made, we do not reach out to confirm an appointment has been made with the specialist, therefore, many patients do not continue with their plan of care.</i>
Desired Outcome(s):	<i>Have better communication between patients and their specialists.</i>
Benefits:	<i>Patients will continue their plan of care and communication between primary care and specialists will become better.</i>

Timeline

	Description of Task and Completion Dates
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Task 1	<i>By 07/15/2024 inform staff of new referral implementation and start new process.</i>
Task 2	<i>07/29/2024 interview staff to make sure workflow has not been affected.</i>
Task 3	<i>08/05/2024 follow up to see if there have been any positive changes with patients scheduling appointments with their specialists.</i>
Task 4	<i>08/15/2024 follow up to make sure we are receiving patient medical records correctly based on referral logs.</i>

Project Scope

In Scope Project Objectives
<p>1. Training and Informing Staff: Conduct training sessions to inform all relevant staff (providers, medical assistants, administrative staff) about the new referral process and its implementation.</p> <p>2. Referral Process Implementation: Ensure medical assistants locate specialists near the patient's home who accept the patient's insurance, make the referrals, and fax the referral details to the specialist's office.</p> <p>3. Patient Communication and Follow-Up: Implement a system where medical assistants call patients to inform them about the referral and follow up after one week to confirm that the appointment has been made with the specialist</p>
Out of Scope Project Objectives or Activities
<p>Out of Scope Project Objectives or Activities</p> <p>1. Specialist Office Coordination: Directly coordinating with specialist offices to ensure they have received the referral and scheduling the appointments for the patients is out of scope.</p> <p>2. Insurance Verification Beyond Initial Referral: Verifying and handling any insurance issues that arise after the initial referral process is out of scope. This includes dealing with any changes in insurance or coverage issues that the patient might face after the referral is made.</p> <p>3. Patient Transport Arrangements: Arranging transportation for patients to attend specialist appointments is out of scope. Patients will be responsible for their own transportation to and from specialist appointments</p>

Project Team

Team Lead:	Zugey Rojo	Project Champion:	Dr. Carlos Lopez
Process Owner:	Malca Cortez	Process Manager:	Dr. Carlos Lopez

Stakeholders			
Stakeholder	Title	Department	Organization
Dr Carlos Lopez	Provider	Management - Provider	Kids and Family Kare
Malca Cortez	Referral coordinator	Kids and Family Kare - Thomas	Kids and Family Kare
Alma Lira	Medical Assistant	Kids and Family Kare Thomas	Kids and Family Kare

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Project Team Members	
Name	Team Role

Signatures

Process Owner	Malca Cortez
Project Champion	Dr Carlos Lopez
Team Leader	Zugey Rojo