## Project Description / Purpose

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| **Project Name:** | *Implementing a new referral process* |
| **Clinic:** | *Kids and Family Kare* |
| **Process:** | *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.* |
| **TIP 2.0 Process Milestone:** | *Referrals* |
| **Project Description / Purpose** | |
| *This new referral process will help us create better communication between the patients and ensure they are receiving*  *proper care.* | |

## Project Overview

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| **Problem Summary:** | *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.* |
| **Desired Outcome(s):** | *Have better communication between patients and their specialists.* |
| **Benefits:** | *Patients will continue their plan of care and communication between primary care and*  *specialists will become better.* |

## Timeline

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|  | **Description of Task and Completion Dates** |
| **Task 1** | Task 1 By 07/15/2024 inform staff of new referral implementation and start new process. |
| **Task 2** | Task 2 07/29/2024 interview staff to make sure workflow has not been affected. |
| **Task 3** | Task 3 08/05/2024 follow up to see if there have been any positive changes with patients scheduling appointments with their specialists. |
| **Task 4** | 08/15/2024 follow up to make sure we are receiving patient medical records correctly based on referral  logs. |
| **Task 5** |  |

\* Add new rows as needed.

## Project Scope

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| **In Scope Project Objectives** |
| *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.*  *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.*  *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* |
| **Out of Scope Project Objectives or Activities** |
| *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.*  *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.*  *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* |

## Project Team

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| **Team Lead:** | Kim Briggs | **Project Champion:** | Kim Briggs |
| **Process Owner:** | Kim Briggs | **Process Manager:** | Kim Briggs |

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| **Stakeholders** | | | |
| **Stakeholder** | **Title** | **Department** | **Organization** |
| Kim Briggs | Kim Briggs | Kim Briggs | Kim Briggs |
| Kim Briggs | Kim Briggs | Kim Briggs | Kim Briggs |
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| **Project Team Members** | |  |
| **Name** | **Team Role** |  |
| Kim Briggs | Kim Briggs |  |
| Kim Briggs | Kim Briggs |  |
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## Signatures

|  |  |
| --- | --- |
| **Process Owner** |  |
| **Project Champion** |  |
| **Team Leader** |  |