

Humboldt County Referral Process

V10.31.15

Process for routine appointments

1. Primary Care (PC) clinician orders a referral to specialty.
2. Referral request is faxed to specialty office (if established patient note this on referral).
3. Specialty acknowledges receipt of referral request by faxing it back to PC with the “referral received” date marked on the form.
4. If PC does not receive confirmation of the referral in 3 days they call the specialty office.
5. Patient told by PC office to call specialty office to schedule their appointment within 5-10 days (from the date referral is faxed over to specialty).
6. When patient calls, specialty schedules the appointment. Referral form is updated with appointment date and faxed back to PC office.
7. If specialty cannot schedule the appointment when patient calls (referral not reviewed yet, etc) specialty will be responsible for letting Patient know when to call back.
8. If Patient does not call specialty for an appt within 12-14 days, specialty faxes back the form with the box “Patient did not call for appt” to PC office. It is PC office responsibility to follow up with the Patient regarding why they did not call for an appointment.
9. If Patient has decided not to follow through with the referral PC office will notify Specialist office.
10. If referral form is denied or deemed incomplete, the needed information or reason for denial is listed on referral form and faxed back to PC office within 14 days of receipt of referral.
11. Referrals are good for 90 days after which they are considered a closed referral.

Process for urgent referrals

1. PC office marks referral form “Urgent”.
2. PC office tells patient that specialty will contact them. If they have not heard from specialty in 5 days they should contact specialty office.
3. If specialty agrees with urgent designation they will contact patient to schedule appointment.
4. If specialty does not deem appointment urgent they schedule a non urgent appt slot when patient calls and marks box “referral deemed routine (not urgent)” so PC office will know urgent status was changed.

Background: In December of 2014, a survey of Humboldt County’s primary and specialty care practices revealed a need for improvements in the way referrals were handled. Six practices (3 primary and 3 specialty care) were brought together to develop and test a new process. Their 3 months of work resulted in a new universal referral form and the process you see above. This new process has been found to save time for both primary and specialty offices, eliminate lost referrals, provide clarity regarding the patient’s role and provide higher quality referrals.