Office Staff Training

Patient Referral Best Practices

Referring patients to a specialist may seem straightforward on the provider end, but how much do patients know and understand about the referral process?

Unless explained to them, patients may leave your office feeling uncertain about what happens next, including how long they'll have to wait before their referrals are approved or how the results from their specialist appointments are shared with their primary care doctors.

The referral process is a common point of dissatisfaction for patients—something that can be easily remedied simply by letting them know what to expect.

What You Can Do

SCAN Health Plan® has included a suggested patient referral checklist template on the reverse side. The template can be printed or integrated into current processes or the electronic health record and can serve as a reminder to walk patients through the referral process and manage their expectations. For a version you can customize yourself, please email askthetrainer@scanhealthplan.com.

SCAN recommends the following best practices for the patient referral process:

- Develop an auto-approval process for referrals to in-network providers, as well as regular screenings, including mammograms, bone density scans, diabetic eye screening, etc.
- Establish a unified referral network team with the appropriate staff, workflows and information systems to help with communicating to patients and providers the referral progress and outcomes.
- Develop a patient referral workflow and post it in common areas for staff to review. The workflow should include next steps to share with patients before they leave the office and should serve as a way to make sure patients understand:
    - Why they're being referred to a specialist
    - How long the referral process will take
    - Who they can call with questions about the referral
    - How they'll be informed the referral was approved and what they can do if the referral is denied
    - How long the referral is good for
    - How many appointments are approved
    - How their primary care doctor will be informed about the results of the specialist appointment(s)
- Ensure that your staff is familiar with the patient referral workflow and that it can clearly be communicated to patients.

For more information about explaining the referral process to patients or to request SCAN Office Staff Training, please email askthetrainer@scanhealthplan.com.

Patient Referral Workflow

To be completed with the patient.

Patient name:	Patient date of birth:	Today's date:
Primary care doctor:	Primary care doctor's phone number:	
Why am I being referred to a specialist?		
How long will the referral process take?	Who do I call if I have questions about my referral?	
For how long is the referral good?	How many appointments are approved?	
When you receive your referral authorization in the mail, be sure to write down the specialist's: Name: Address: Phone number:		
Call the specialist to schedule your appointment. Some questions to ask as you're scheduling your appointment might include: What are my next steps? How will the specialist let my doctor know about the results of my appointment(s)? Use this space to write down any additional questions you have for the specialist:		

Write down your current medications here, including any over-the-counter medications, vitamins and supplements you're taking.
Tear this part off and bring it to your specialist appointment.

1.	2.	3.
4.	5.	6.
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