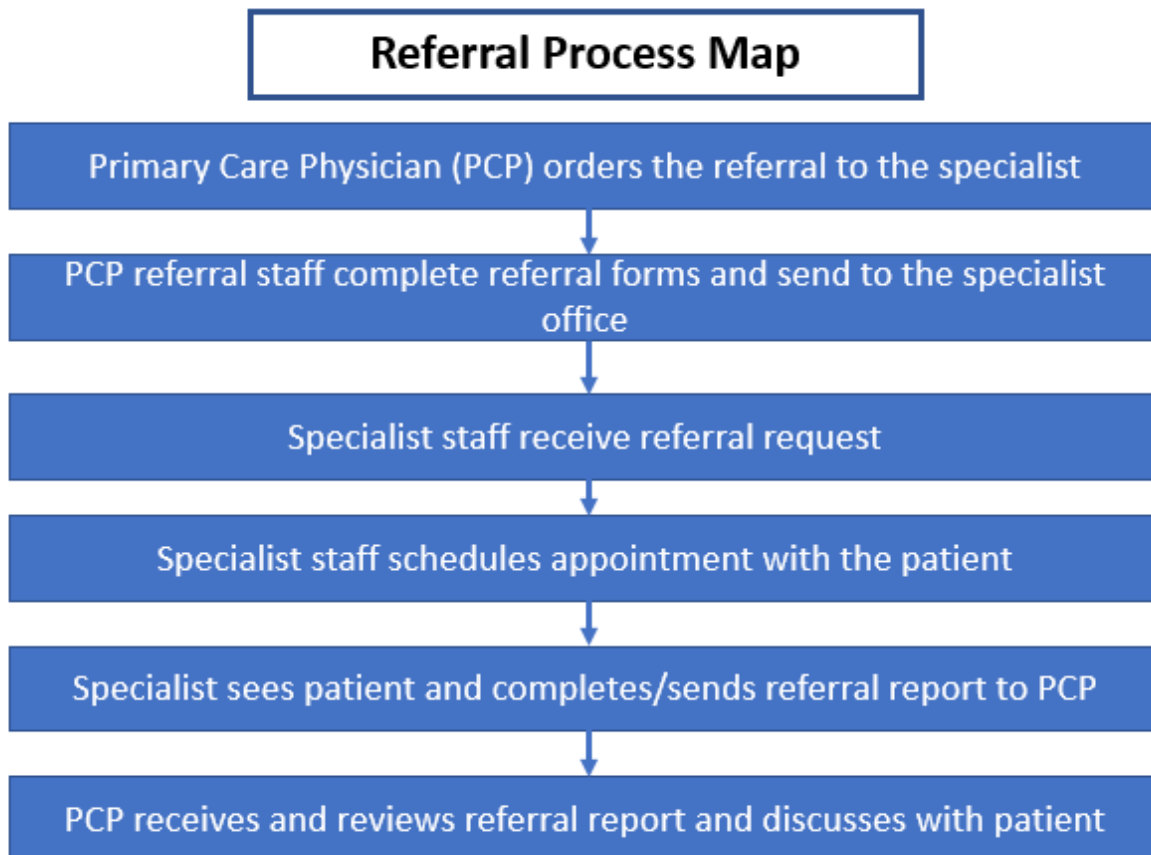## The Referral Management Process

The following graphic (Figure 1.) reflects a general referral process, initiated by a PCP ordering a patient's referral to a specialist, the PCP office sending the referral to the specialist, the specialist securing an appointment with the referred patient, the specialist completing the requested referral, the specialist sending a report to the PCP, the PCP reviewing the report findings, and finally the PCP discussing the subsequent plan with the patient. The way the process should work ideally.

Figure 1

Referral Process Map

Primary Care Physician (PCP) orders the referral to the specialist

↓

PCP referral staff complete referral forms and send to the specialist office

↓

Specialist staff receive referral request

↓

Specialist staff schedules appointment with the patient

↓

Specialist sees patient and completes/sends referral report to PCP

↓

PCP receives and reviews referral report and discusses with patient

Typical Referral Request Workflow Found in Pilot Projects

In the pilot project, the most common work flow for requesting a referral is summarized in Figure 2. Please note that Figure 2 reflects the key responsibilities of the PCP, the key responsibilities of the Specialist, and the key components of the outgoing referral document.

The PCP identifies the need for a referral, enters the referral into the EHR, and sends the referral to the Referral Coordinator (RC). The RC faxes the referral to the specialist's office staff via the EHR. The PCP's RC then attaches and sends the Summary of Care Record with the referral to the specialist that includes: Care Plan field (goals and instructions), care team (other providers), reason for referral (clinical question), current problem list, current medication list, and current allergy list.

Figure 2.