

BRAZOS VALLEY COMMUNITY ACTION AGENCY, INC.
Health Services

Policies and Procedures

Policy Subject/Title: Referrals

Applicability: All Community Health Clinic Staff

Purpose: To provide a consistent, orderly process for the making and tracking of referrals for care made by agency healthcare providers.

Policy:

In order to provide specialized services, to accurately diagnose, and to improve patient satisfaction, it is the policy of the center to provide consultations, referrals, or transfers to other health care providers or settings when deemed medically necessary and/or will be considered at the patient's request. When the center uses external resources to meet the patient's needs, it participates in coordinating the patient's care, treatment, or services.

Procedure: (See Appendix 1 for flow diagram of the following procedure.)

- 1) Provider initiates a referral to a specialist, whether it is internal or not.
- 2) There are two (2) options for assisting patients in making the appointments for the referral.
 - a) The provider's clinical staff can coordinate with the patient and the referral source to set up the appointment and ensure that all necessary records are sent to the referral source.
 - i) The patient is given written documentation of the appointment time, the name of the provider/case manager they will be seeing and the address of that provider's/case manager's office.
 - b) The provider can refer within the electronic medical record to a case manager at the Bryan/College Station Community Health Center. An appointment can be scheduled with the Bryan Case Manager prior to the patient leaving their appointment at their home clinic. It is **critical** that an **accurate telephone number and address** are in the record.
 - i) The case manager can contact the patient by phone. This is the initial encounter with the case manager and all information can be gathered through this telephone contact.

- ii) **Or**, if the patient prefers an on-site appointment one is scheduled with the case manager at the Bryan/College Station Clinic.
- 3) The case manager will “work” the case, i.e. locate a referral source, set up the appointment, obtain any information that may need to be sent or relayed to the patient concerning the appointment, will contact the patient by phone or in writing regarding the appointment, as necessary, and all information is documented within the electronic medical record in the referral section.
- 4) In cases where the appointment with the specialist cannot be kept due to extenuating circumstances on the part of the patient, i.e. funds not available to pay for the appointment, we will document within the medical record’s referral notes what the outcome of the referral was and reassign to the ordering provider for review. The provider can at this point close the referral, follow-up with the patient or order some other action.
- 5) All referral appointments must be followed up by a designated staff person at each clinic site. If the referral is handled by an agency case manager that position is responsible for following up and documenting in the referral section of that patient’s medical record the status of the referral.
- 6) At the time the confirmation is received that the patient kept the appointment a copy of the records from that visit will be requested sent to the patient’s home clinic or the case manager.
 - a) Upon receipt the records will be scanned into the patient’s electronic medical record, and
 - b) A telephone message sent to the referring provider that the referral is being closed and that the scanned records are available for review in the electronic medical record.
- 7) A follow-up will be done at least every two weeks to verify receipt of the copy of the consultant’s notes or a subsequent request made by telephone for a copy of the records will be made and documented in the referral section of the electronic medical record.

Appendix 1

