Patient Identification and Referral Workflows

Patient Identification Processes

Specify who will be involved with the patient identification process, from key stakeholder groups:

Group	Who will be involved?	What will be reviewed/generated?	How often?
Health Plan			
SB 1004 Provider			
Primary care			
Specialty care			
Other:			
Other:			

What are the best communication strategies/mechanisms? (For example, ad hoc or routine email communication, virtual or in-person meetings, etc.)

- Between Health Plan & SB 1004 Provider
- Between Health Plan & Primary/Specialty Care
- Between SB 1004 Provider and Primary/Specialty Care

If you're unsure of optimal communication strategy for one or more of the above groups, who will communicate with the partner group(s) to determine this?

Referral Workflows

Are all SB 1004 partners aware of the processes for referring and obtaining authorization to deliver services?

How will you assess the referral process (for example, time from referral to authorization, time from referral to when patient/member was first seen/enrolled)?

When will the referral process be re-evaluated by plan-provider?

Patient and Provider Outreach Plans

PROVIDERS

Which provider groups/clinics may need more information about SB 1004?

Who will reach out to the identified provider groups/clinics? When? How?

PATIENTS/MEMBERS

Which patient/member population(s) might you want to target for outreach/education initiatives?

What organizations (community, clinical) might be able to assist with informing this population?

What materials are available to inform patients about palliative care, and/or SB 1004 services?