Tool 8 Resource: Referral Procedures from Southside Podiatry

Original document follows.

Enter Clinic Name Here
Policy & Procedures

Referral to Podiatry Clinic

1. Purpose

This policy and procedure exists as a guide to be followed by primary care providers/clinic staff for all referrals being made to the Southside Coalition of Community Health Centers' (the Coalition) for the Podiatry Clinic, as operated by St. John's Well Child and Family Center at 5801 S. Hoover Street, Los Angeles, CA 90037. This Policy is in place to assure that the referral process is completed correctly throughout its' sequence.

2. Scope

This policy and procedure applies to all staff at *Enter Clinic name here* involved in the referral process. Staff includes: *enter all staff (titles) involved in the referral process here. For example: Referral Coordinator (RC), Provider, Medical Assistant (MA).* The scope of this document outlines the process to be followed from the initial receipt of the provider referral to the follow-up required upon the completion of the patient visit to the Podiatry Clinic.

3. Responsibilities

- Enter Staff Title(s) has the responsibility for the maintenance of this procedure.

4. Actions

A Making the Referral

Steps	Who is Responsible?	Notes
1. Patient is seen at *enter your clinic name here*.	Provider	
2. Upon examination, make a determination to refer the patient for podiatry care at SJWCFC.	Provider	
3. Complete the Specialty referral form.	Provider	
4. Give referral form to *enter department/staff who manages all referrals*	Provider, MA	
5. Give the patient an appointment before leaving the clinic. There are two options to do this: a. Call the Specialty Care Coordinator (SCC) directly to schedule a patient	RC	• The SCC is available by telephone Tuesday through Friday for scheduling appointments.

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Steps	Who is Responsible?	Notes
appointment at <removed> b. Review the appointment calendar that is emailed by the SCC weekly and give the patient an appointment based on available time slots.		
6. Give the patient an appointment card with the map and directions to the Podiatry Clinic	RC	
7. Create a new case in Patient Tracking System for the patient.	RC	
8. Enter patient referral information into the Coalition Care Net, a web-based referral and information retrieval system. Electronically scan and upload any pertinent notes, labs, or x-rays to the referral system. *If the patient has health insurance:* a. A treatment authorization must be completed, scanned and attached to the referral on CCN b. A copy of the patients medical insurance card (front and back) must be scanned and attached to the referral using CCN	RC	• Clinic staff initiating the referral will enter the tentative appointment date under the "Referral Coordinator Notes" section in CCN. For Example: "Pt appt requested for 01/31/09 at 9:15am." *Do not enter the appointment date under the drop down menu for the date of appointment.* • Once an appointment is confirmed by the SCC, the clinic staff at the referring clinic will receive an email to confirm the date and time of the patient's appointment. • Patients with health insurance may be referred to the Podiatry Clinic.
9. The week of the appointment, the clinic staff will receive a list of all appointments scheduled	RC	

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Steps	Who is Responsible?	Notes
for the Podiatry clinic for their patients, and will be responsible for initiating reminder calls.		

B Results of Referral

Steps	Who is Responsible?	Notes
1. Check for automatically generated email (to notify that Specialist case notes are completed) on a daily basis.	RC	• Once the patient has been seen by the specialist, the progress/case notes will be available within two (2) to five (5) business days on the web based system. Urgent requests will be available within one (1) to two (2) business days. • SCC will notify referring clinic of any urgent notes within one (1) business day of completed visit, by telephone or email.
2. Enter progress/case note information into Patient Tracking System and close the case.	RC	
3. Print the case note from CCN and give to the referring provider for review.	RC	
4. Determine whether the patient's medical record needs to be pulled for review or the progress/case note can be filed into the patient's medical record	Provider	• In the event that the patient will require additional visits to the specialist, the SCC will have the authority to reschedule the patient for a follow-up appointment

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Steps	Who is Responsible?	Notes
		with the specialist, immediately following the patients' visit with the specialist.
5. File progress/case notes in patient medical record under specify section of medical record here once referral is completed.	Medical records representative	

C Additional Follow-Up

In the event that additional follow up is needed for procedures, labs, x-rays, medication or other diagnostic information the following will apply.

Steps	Who is Responsible?	Notes
1. Patient will bring all written orders from the Specialist to *Enter clinic name here* and will present to *specify a staff or department who will receive this request.*.	*Specify*	• Specialist will make all requests in writing for any additional follow up needed. • SCC will instruct the patient to return to referring clinic and present to the *specify staff or department.*.
2. Will follow existing walk-in Policy/Procedures outlined by *enter clinic name here* to order labs, fill prescriptions, etc.	*specify*	
3. Send requested labs, follow-up information to SCC via electronic transmission once completed.	RC	
4. If the patient requires intervention beyond the scope of care by the podiatrist in an	RC/SCC/Podiatrist	

Steps	Who is Responsible?	Notes
outpatient setting: a. The patient will be scheduled directly by the podiatrist or SCC for the procedure at an appropriate venue. b. The patient will be referred to the Department of Health Services using RPS by the clinic staff.		

5. Associated Documents

Specialist Referral Guidelines