



## Standard Operating Procedure

<b>Procedure Title:</b>	<b>Outgoing Referral Process</b>
<b>Date:</b>	<b>9/22/22</b>
<b>Version:</b>	<b>2.0</b>
<b>Department:</b>	<b>CIC</b>
<b>Approved By:</b>	<b>Brooke Gregory</b>

**Purpose:** This SOP is to provide guidance on the steps needed to properly process an outgoing referral.

**Procedure:** During a visit, through a patient case or by patient request, it is determined by the medical provider that the patient would benefit from a referral to an outside source. The Medical Assistant (MA) is then responsible for processing the referral and sending appropriate documents to support the need for the referral.

- 1. Once the provider has determined that a referral is necessary,** the medical assistant will take over and process the referral.
  - a. The MA will locate the referral in the Orders/Rxs/Auths bucket
  - b. Check that the office visit note has been signed off (if referral has been initiated through an office visit) **\*OV note must be signed off prior to sending w/ referral**
  - c. Check internal note section of referral to see if the provider has requested specific items to be sent with the referral
  - d. **Verify the patient's insurance prior to processing the referral,** if the patient has Allcare or Triwest send referral to Priorauthorizations bucket.
- 2. Once referral is ready to process,** the MA will attach the following documents by clicking on attachments:
  - a. Click on Chart and attach Allergy List, Facesheet, and Medication List
  - b. Click on Encounters and Procedures and attach any pertinent chart notes
  - c. Click on Imaging Results and attach any pertinent imaging results
  - d. Click on Lab Results and attach any pertinent lab results
- 3. Once all pertinent documents have been attached** to the referral it is ready to be sent, **excluding referrals for Allcare or Triwest insurance.**
  - a. Double check that there is a Clinical Provider attached to the referral
  - b. Click on view actions at the bottom of the referral
  - c. Click Submit by Athena Fax to send the referral
- 4. If the patient has Allcare or Triwest insurance,** MA to route the referral to the Priorauthorizations bucket.
  - a. Prior authorization department will check for needed PA and process accordingly.

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