

MEDFORD

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Complete Care Health Centers
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Procedure Title:	CIC VA Referral & Authorization Workflow
Date:	09/24/2025
Version:	1
Department:	Complete Integrative Care, Primary Care-EP
Approved By:	Melissa Carrigan

Purpose

To establish a consistent process for handling VA referrals at Complete Integrative Care (CIC), ensuring that patients are registered, scheduled, and authorized correctly with timely communication between staff.

Responsibilities

- **Referral Coordinator/Receptionist/Billing:** Receives and routes incoming VA referrals.
- **Referral Coordinator:** Registers patients, schedules appointments, and forwards cases for prior authorization.
- **Prior Authorization:** Enters VA authorizations, tracks them, and communicates with the VA.
- **Front Desk Team:** Updates patient cases in Athena to notify Katie once scheduling is complete in the event she is unable to take the call.

Procedure

Step 1: Referral Intake

1. VA referral fax is received.
2. Referral is placed into the Referral Coordinator bucket in Athena.

Step 2: Patient Registration & Scheduling

1. Referral Coordinator reviews the referral.
2. Referral Coordinator calls the patient to:
 - Register them in Athena.
 - Schedule the appointment.
3. If the referral coordinator is unable to reach the patient and the patient later calls back to schedule, and the referral coordinator is unavailable to take the call, the scheduler must

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document the patient case in the patient's chart that they were scheduled so that the referral coordinator can continue with the next steps.

Step 3: Prior Authorization

1. Referral Coordinator forwards the referral to prior authorizations.
2. Prior Authorizations:
 - Enters the VA authorization.
 - Adds the case to the VA Auth Tracking Sheet.
 - Notify the VA of the scheduled appointment.
3. Prior Authorization follows up with the VA until the final authorization is received.

Step 4: Documentation & Follow-Up

- All steps must be documented in the patient case within Athena.
- If the patient does not respond to referral coordinator's call:
 - Referral Coordinator may leave a voicemail.
 - If the patient calls back, any receptionist may schedule the appointment, then update the patient case so referral coordinator can continue the workflow.