5 Ways to Improve the Referral Process for Patients and Staff

This is an extra resource to go along with the original article:
[How to make patients happier during the intake and referral process]

Patient satisfaction and quality of care depends on how effectively staff and practitioners can communicate during the referral process, even if patients are just being referred to other departments in the same practice.

Here are 5 ways that staff can ensure their referral process can keep patients happy.

1. Standardize internal office communication

Effective communication between physician and referral coordinators is essential to the referral process. Typically, the referral coordinator is responsible for things like scheduling appointments with specialists, informing patients about their appointments, and providing documentation.
If communication methods are not standardized between departments, patient data that might be vital to their appointment and diagnosis can quickly get lost or missed.
To reduce the chances of this happening, standardize the way that communication is handled between departments (email, EMR/EHR systems, etc.) so that there's no gap in communication.

2. Schedule referral patients as soon as possible during the initial appointment

Once a patient has completed their initial appointment (and they need to be referred elsewhere), the referral coordinator should be actively involved in scheduling the patient and coordinating their next steps.
Depending on the type of referral, the coordinator may be able to phone another department or office and schedule that patient before they leave the coordinator's office.
By handling scheduling on behalf of the patient, you increase their chances of showing up to the appointment and make the process smoother overall.

3. Make sure staff is trained to handle referral information

After a patient's appointment has been scheduled, the proper information needs to go to the right people.
Patient intake or referral forms, along with the any other recommended documentation indicated by the primary care physician, needs to be included on the patient referral form and sent to the right location/people.
Optimizing this workflow is essential for a successful referral, so be sure that staff understands what paperwork is needed for referral patients and where it should go once the referral is made. This may involve emailing or contacting the referring practice or department on behalf of the patient.

4. Use EMR/EHR to track and analyze referral results

Once the referral process is underway, patient data is typically stored away and often forgotten. The trouble with this is that in some cases, patients will end up being referred back to their original care provide (you) for something else, and if their new patient data (from their referral) isn't transferred to their files in your system, it can be difficult to track and manage their care. If the patient sees multiple providers for the same condition, care can become nearly unmanageable if patient data isn't tracked and analyzed. This is where the use of EMR/EHR systems can help, as they can keep files in a centralized location and make sharing easier.

5. Gather patient feedback

It's important to understand how the patient feels about the referral process, as they're the ones who are moving between offices or departments to be treated.

A patient satisfaction survey can help answer questions about whether or not they received an appointment time they wanted, how and when they were notified of their appointment, their overall experience with your (and the referring provider's) practice, and their attitude toward their care.

Gather this information will help you implement new solutions to meet patient needs and keep them happy throughout the referral process, as well as help staff become more effective at moving people through the process with as little stress as possible.