

## Referral Checklist *step-by-step to a complete referral*

This is an *optional* tool, provided to assist you in tracking your referral progress. **It is not a required form.**

Patient Name \_\_\_\_\_ Start Date \_\_\_\_\_ End Date \_\_\_\_\_

1.  **PATIENT ENROLLMENT PACKET** – Screen for eligibility & assist with application if necessary. Patients may be eligible for “bridge” care if an OHP application is pending. PAMC will provide a patient orientation.
2.  **ENSURING A REFERRAL IS APPROPRIATE – Medical Necessity & Appropriateness** Please verify an authorized staff provider has approved the referral. Online [Medical Referral Guidelines](#) are available for support.
3.  **SUBMIT REQUEST FOR REFERRAL** – send the referral request **and** the patient application to PAMC.
4.  **RECEIVE MEDICAL REFERRAL NOTICE** - when patient enrollment is approved, PAMC will fill the request and return the confirmation medical referral form to you indicating which specialist has received the referral.
5.  **SEND PATIENT MEDICAL RECORDS** –to the specialist, along with any relevant lab or imaging results, **before scheduling an appointment**. Communicate about any current diagnostic orders with the specialist.
6.  **ORDER LOOK FOR/RULE OUT DIAGNOSTICS** – utilizing the online medical referral guidelines – order any necessary labs & diagnostics at participating labs. Copy results to the assigned specialist.
7.  **MAKE THE FIRST APPOINTMENT** – Notify PAMC of the appointment date. Patients may schedule subsequent appointments. **Appt Date and time** \_\_\_\_\_
8.  **PAMC WILL SCHEDULE INTERPRETIVE SERVICES** – if requested by referring clinic or patient.
9.  **CONFIRM PATIENT ATTENDANCE 3 Business Days Prior to Appointment** – obtain a **verbal confirmation** from your patient about the upcoming appointment. If no confirmation is received, cancel with the specialist at least 48 hours before the scheduled appointment and notify PAMC.
10.  **LABS & DIAGNOSTICS** – Referring Clinic PCP may order labs, imaging, therapeutic interventions, pharmacy or other ancillary services relating to the *initial diagnosis* of a potential specialty referral (look for/rule out) according to the online Medical Referral Guidelines. Call PAMC or check online for participating lab/imaging sites.
11.  **PHARMACY PROGRAM** – Limited formulary, co-pay of \$4 and formulary restrictions apply. Project Access NOW provides formulary management & overrides, and an Rx Specialist to complete applications for any Prescription Assistance Programs. **Call Project Access NOW at 503-954-1746** for pharmacy assistance.
12.  **FOLLOW-UP CARE** - discover new appointments and support patient with necessary post specialist care. PAMC will fax the specialist for notes on next steps – and share information with you. Patients are asked to call their care coordinator, then you can share info with us.
13.  **HOSPITAL SERVICES** – if a procedure or surgery is scheduled, communicate with PAMC. PAMC will order anesthesiology, provide authorizations and support to hospitals in processing a project access patient through their system.

### NOTES: