

# SOP Template: Referral and Follow-up Appointment Coordination

This SOP details the process for **referral and follow-up appointment coordination**, ensuring efficient management of patient referrals, scheduling of follow-up visits, communication with healthcare providers, documentation of referral information, patient reminders, and tracking of appointment outcomes. The goal is to enhance continuity of care, improve patient compliance, and optimize healthcare service delivery through timely and organized coordination.

## 1. Purpose

To provide a standardized process for coordinating patient referrals and follow-up appointments to ensure continuity and quality of patient care.

## 2. Scope

This SOP applies to all staff involved in patient referral management and the scheduling of follow-up appointments in the healthcare facility.

## 3. Responsibilities

- **Referring Provider:** Identifies need for referral, completes referral documentation, communicates clinical information.
- **Referral Coordinator / Administrative Staff:** Processes referrals, schedules appointments, ensures communication and documentation.
- **Receiving Provider:** Reviews referral, accepts or requests additional information, provides follow-up details.

## 4. Procedure

1. **Referral Initiation**
  - Referring provider assesses patient and determines need for referral.
  - Complete referral form with relevant clinical information.
  - Obtain patient consent where required.
2. **Referral Processing**
  - Referral coordinator reviews referral for completeness.
  - Contact receiving provider/facility to schedule appointment.
  - Document referral and appointment details in patient record.
3. **Communication**
  - Ensure all necessary clinical information is transmitted to receiving provider.
  - Confirm appointment date and time with patient.
4. **Patient Follow-up**
  - Provide patient with referral details and instructions.
  - Send automated or manual reminders prior to the appointment.
5. **Tracking and Documentation**
  - Record outcome of referral (e.g., scheduled, completed, missed, declined).
  - Follow up on unanswered or missed appointments.
  - Update patient's primary provider on referral outcome.

## 5. Documentation

- Record all referral and follow-up details in the Electronic Health Record (EHR) or designated log.
- Maintain documentation for audit and quality improvement purposes.

## 6. Quality Assurance

- Review referral completion and follow-up rates quarterly.
- Identify and address process gaps.

## 7. References

- Facility policies on referrals and follow-up care

- Relevant legal and accreditation requirements

## 8. Revision History

Date	Version	Description	Author
2024-06-05	1.0	Initial SOP template created	[Your Name]