

SOP Template: Arranging Follow-Up Appointments and Referrals

This SOP details the process for **arranging follow-up appointments and referrals**, covering patient assessment, scheduling procedures, communication with healthcare providers, documentation requirements, and patient education. Its purpose is to ensure seamless continuity of care, timely specialist consultations, and effective coordination among medical teams to enhance patient outcomes and satisfaction.

1. Patient Assessment

- Review the patient's medical history and current clinical notes to determine the necessity of follow-up or referral.
- Consult with the treating provider to confirm details, urgency, and specialist or service required.
- Assess any barriers (transportation, language, financial) that could affect appointment adherence.

2. Scheduling Procedures

- Contact appropriate specialist, clinic, or diagnostic service as indicated.
- Coordinate appointment times, taking patient preference and provider availability into account.
- Document all scheduled appointments in the patient's electronic medical record (EMR) or scheduling system.
- Provide written and verbal confirmation of appointment details to the patient.

3. Communication with Healthcare Providers

- Send referral letters, supporting documentation, and relevant test results to the receiving provider or clinic.
- Clearly state the reason for referral and any pertinent history or findings.
- Follow up to ensure receipt and acceptance of referral where needed.

4. Documentation Requirements

- Record all steps in the EMR, including date/time of appointments, contact details, and documentation sent.
- Note any patient refusals, cancellations, or changes in plan, including reasons given.
- Retain a copy of all communications for quality assurance and follow-up.

5. Patient Education

- Explain the purpose and importance of follow-up or referral appointments to the patient (and family/caregivers as appropriate).
- Provide clear instructions on preparations, location, time, and any necessary documentation or referrals.
- Educate about consequences of non-adherence and offer support for patients with special needs.

6. Quality Assurance and Improvement

- Monitor missed appointments and referral follow-through as part of quality metrics.
- Identify trends or barriers in care coordination and address with team meetings or process changes as needed.

7. Responsibilities

- **Clinical Staff:** Identify follow-up/referral needs and communicate with administrative staff.
- **Administrative Staff:** Schedule appointments, manage referrals, document communications, and assist with

patient coordination.

- **Providers:** Provide necessary clinical documentation for referrals and verify that follow-up is arranged.

8. References

- Institutional policies on referral and scheduling procedures
- Relevant EMR or documentation guidelines
- Local and national best practice guidance

9. Review and Updates

- This SOP should be reviewed annually, or when process changes occur, and updated as necessary.