

6. Patient Referral Checklist

This document is designed to be given to patients prior to their specialist visit by the referral coordinator. The document provides information to prepare patients for their upcoming appointments and prompts them to be active participants in the referral process.



REFERRAL PREP CHECKLIST

1. Do I know whom I'm seeing?
2. Do I know how to get there?
3. Do I know the reason for the referral?
4. Do I have questions I want answered at the visit? Are they written down?
5. Do I need tests or procedures before the visit?
6. What do I need to do to be ready for the visit?
 - a. Bring medications?
 - b. Bring records or X-rays?
 - c. Change my usual eating?
7. Is there anything else I should know about the visit?
8. Will my insurance cover the visit? If so, will there be co-pays or other charges??
9. Do I know who to call if I have trouble with the referral?
10. What can I expect after the visit?
 - a. Who will tell me what to expect next?
 - b. Do I need to check in with my primary care team?
 - c. Will I see the specialist again?