The Clinic Referral Process

Patient feedback provides selfmanagement goals for the care plan and reinforces patient activation.

Next Appointment: Patient returns to the practice and is given a new self-management form at the front desk.

Patient receives a copy of their new self-management goal at check-out.

Contacts of all referrals are regularly sent to the clinic. The clinician then has access to the patient's self-management information and can review it with the patient. Front Office staff hands the patient selfmanagement info at check-

in.

COAW assists community partners in establishing joint expectations in support of the practice and the patient.

COAW provides training, samples, and technical assistance in PCMH relevance and clinic workflow.

Medical Assistants review the selfmanagement info and prior charted goals with the patient.

Medical Assistants charts and prepares referrals.

Clinician reviews patient's selfmanagement info and okays referrals. Selfmanagement support trainings and tips for medical assistants/all staff on messaging and patient engagement are available.





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The Community Program Process

The feedback letter to the practice helps them document patient progress and reminds them to refer more patients to your workshops.

Provider uses letter in charting the patient's selfmanagement goal.

Feedback letters sent to providers.

As part of the workshop, patient writes a letter to provider describing what he/she has learned.

> Patient attends workshop.

You and your local clinic meet to discuss selfmanagement.

Clinician is interested in referring to your program and introduces to

patient.

assistance.

COAW provides training, scripts, and technical

Patient agrees and referral is documented

Referral form faxed in or sent through secure email.

COAW provides forms and messaging and for the clinic, and will handle referrals and enrollments for you.

Details on patient contacts sent to the clinic weekly.

Referred patient is contacted and enrolls in workshop.





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This Form has been developed by the Consortium for Older Adult Wellness. Please reference COAW in all reprints or revisions. The NM DOH website allows tracking of referrals, reports to the clinic, completer numbers, and more.