

15.18 MEDICAL SERVICE REFERRAL GUIDELINES

Referral definition: Written information from a Title X provider for a client to see a comprehensive primary care provider or OB-GYN, and/or to receive certain medical or social services.

Policy: Title X clinics must arrange for appropriate client referral for medical services. When appropriate, Title X clinics must establish memorandum of understanding with referral agencies. Medical referrals outside of the scope of family planning services may include, but are not limited to:

1. Counseling outside of the family planning requirements
2. Emergency care
3. HIV/AIDS care and treatment
4. Infertility specialists
5. Chronic care management
6. Any other service that is identified by the clinic

Procedure:

1. Title X clinics must develop a follow-up plan, in cooperation with the client, when referred for services.
2. Client's consent must be obtained to provide client information to a referral provider, except as when required by law with appropriate safeguards for confidentiality.
3. Mechanisms for follow-up must be negotiated with the client on the first visit, and the method of follow-up should be noted in the client's medical record (e.g. mailing address, phone number, and other method of contact).
4. Any referral/follow-up counseling, contacts, and attempts to contact a client or referral providers, must be documented in the client's medical record.
5. Documentation must be in the client's medical record that they were advised of the referral, counseled on the importance of the referral and that it is the client's responsibility to comply with the referral.
6. Clients refusing appropriate follow-up for abnormal cervical cytology, laboratory results or physical findings must be counseled regarding potential consequences of their refusal for recommended care and must have their counseling and refusal documented.
7. Title X clinics may aid the client in identifying potential resources for reimbursement of the referral provider, but agencies are not responsible for the cost of this care. Title X clinics should explore potential alternative sources of reimbursement for the referral care.
8. A Title X project may not use the provision of any prenatal, social service, emergency medical, or other referral, of any counseling, or of any provider lists, as an indirect means of encouraging or promoting abortion as a method of family planning.

A medical referral should be written and refer a client to another health care provider or agency. The information included in the referral should be organized in a concise and professional manner and should include the following, as appropriate:

1. Date
2. Client identification (name, client number, date of birth)
3. Nature of the referral
4. Abnormal findings
5. Method of contraception (what and how long used)
6. Laboratory test results obtained at the clinic, if applicable (pregnancy test, serology, sexually transmitted infections, Pap, Hematocrit, urine)
7. Information requested from other medical source
8. Any other pertinent information

The referral form should involve two copies.

1. The "doctor's copy" is the copy for the referral provider
2. The "file copy" is filed and is a permanent part of the client's medical record