

## Guiding Patients Through the Referral Process

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Connecting Your World

Secure Text, Voice, and AI

Guiding Patients Through the Referral Process

Connecting Your World:  
How to manage the referral process to grow you network , improve outcomes, and increase productivity



Referral Spot Light

## Guiding Patients Through the Referral Process Part 4

### Growing Referrals and Patient Satisfaction Takes More than Marketing

Guiding caregivers through the referral process.

We started this newsletter with a concern for guiding the patient. Another aspect to it worth considering is guiding the caregivers through the referral process.

**Legal and regulatory frameworks govern the referral process in healthcare, including HIPAA and other privacy laws. Providers who fail to comply with these regulations may be subject to legal action, including fines, penalties, and even loss of licensure.**

How do you protect yourself: Comply with the standards

The AMA and American Dental Association (ADA) have published guidelines for managing patient referrals. For dentists, the ADA has guidelines in their Principles of Ethics and Code of Professional Conduct Section 4.E., Referral to Specialists:

Guidelines emphasize the importance of providing the specialist with appropriate diagnostic and treatment information. The guidelines also highlight the importance of follow-up and monitoring the patient's progress after the referral.

Dentists and physicians can reduce their risk of legal liability by ensuring that they comply with relevant legal and regulatory requirements related to patient referrals, HIPAA, and the use of secure messaging platforms:

A secure messaging platform like AwrelCONNECT can improve communication and collaboration among care teams. The goal should be to streamline and simplify the process and reduce the risk of errors or complications.

Make it simple, efficient, and effective. Use one platform for all your referrals.

Here's how to make it easy:

Select a platform like AwrelCONNECT that can provide the efficiency of your native texting app with the functionality and security required by law.

Treat this process as technical communication with the benefit of having information at your fingertips where and when you need it.

Work with the simplicity of your native texting app, with business separation, the wisdom of a secure program, respect for your patient's and colleague's privacy, and the security required by law.

If you use an EDR or EMR, you may have the tradeoff of quick access to information, limitations to files you can store and share, communication with patients, and limitations connecting with guests outside of your network.

Your management system provides many options and solutions but has some self-interests to keep access to information proprietary. Consider a flexible platform for secure business communication and collaboration that can be integrated into the management system. And consider working with a mobile-friendly application that does not require a download and provides simple SMS secure links to engage members and guests of your network.

Here's a reasonable order for managing a referral.

1. Create a new secure messaging thread on a secure messaging program that provides the functionality you need
2. Add the patient's name, the reason for the referral, the goal of the referral, and relevant medical and dental information, along with the patient's condition.
3. Assign the message to the specialist.

All communication and file sharing should happen in this single thread, including reports and documents supporting the process. For a patient referred for root canal therapy, this thread should include presurgical radiographs, case discussion and requirements, final films, and a service description to replace hard copy reports sent by snail mail and other alternative inefficient communications platforms. This will make your life easier, safer, and more predictable.