Evaluation of a Referral Management Program in the Retail Telehealth Setting Integrated in a Large Healthcare System

Jeffrey D. Vu, MS, RN, FNP-BC & Vinciya Pandian, PhD, MBA, MSN, RN, ACNP-BC

Background

- Prolonged connection to referral services contributes to the 12 million diagnostic errors occurring every year in ambulatory care
- 1 in 3 adult patients is referred totaling over 100 million clinical referrals annually in the US
- A reliable and patient-centered referral management program can benefit health systems by improving timely referral follow-up and treatment, decreasing diagnostic errors, and healthcare costs

Objectives

This quality improvement pilot project evaluated the effects of a referral management program in a retail telehealth clinic setting.

Aims: To determine whether a referral management program will:
- result in an increase in referrals appointments initiated
- result in an increase in referrals completed
- result in an increase in appointments referred to in-network clinicians

Design

- Design: pre-post intervention design with different groups
- Setting: a retail telehealth clinic setting in a large health system
- Sample: convenience sample of 158 total referrals, >18 years old
- Exclusions: insurance not covered by the clinic
- Timing of Intervention: Sep-Nov 2020 enrollment period
- Analysis: Fisher’s Exact test compared binary categorical data

Evidence Based Intervention

- Referral Care Coordinator: dedicated staff to contact patients and coordinate referral appointments
- Referral Tracking Sheet: documents demographics, contact information, status of appointment initiation, referral appointment completion, and in-network referral status

Sample Demographics

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>pre-intervention (n=56)</th>
<th>post-intervention (n=102)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age, mean (SD)</td>
<td>34.3 (12.3)</td>
<td>36.5 (13.3)</td>
</tr>
<tr>
<td>Sex, n (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>27 (48.2)</td>
<td>40 (38.5)</td>
</tr>
<tr>
<td>Female</td>
<td>29 (51.8)</td>
<td>64 (61.5)</td>
</tr>
<tr>
<td>Specialty Type, n (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Care</td>
<td>55 (98.2)</td>
<td>88 (84.6)</td>
</tr>
<tr>
<td>Medicine Specialty</td>
<td>1 (1.8)</td>
<td>14 (13.5)</td>
</tr>
<tr>
<td>Allied Health</td>
<td>0 (0)</td>
<td>2 (1.9)</td>
</tr>
<tr>
<td>Other</td>
<td>0 (0)</td>
<td>0 (0)</td>
</tr>
</tbody>
</table>

Results

- Referral Initiation: Increase in absolute number from 3 appointments pre-intervention to 13 appointments in the intervention group (p=0.113)
- Referral Completion: No statistical difference between pre- and intervention groups (p=0.669)
- In-network referral status: Statistically significance in increasing in-network referrals (p<0.01)

Findings

- A referral management program streamlines the process benefitting patient safety & incentivizes the health system

Discussion & Conclusion

- A Referral Management Program can increase the number of patients that schedule their follow-up appointment improving safety
- The Referral Management Program drives patients back to in-network referrals
- Health systems are financially incentivized to manage referral in a timely manner
- Findings align with evaluation of similar referral management programs
- Smaller sample size may contribute to differences in statistical significance
- Evaluation of a Referral Management Program in telehealth is a novel setting
- The telehealth setting leads to asynchronous communication affecting engagement with patient contact

Limitations: Implementation during the COVID-19 Pandemic limited availability to non-urgent clinical appointments which affected referral outcomes during the observation period. In addition, dedicated staff for the Referral Care Coordinator was restricted due to pandemic response.

Sustainability: the health organization recognizes the benefit of maintaining a robust Referral Management Program and has committed to dedicating staff in multiple regions to the role of Referral Care Coordinator

Key Resources


