

**FAMILY PLANNING PROGRAM****SECTION:** Medical Services Administration**POLICY AND PROCEDURE MANUAL****SUBJECT:** Referral and Follow-Up

**POLICY:** Family Planning clinics should refer clients to appropriate providers for services deemed necessary which are outside their scope of practice.

**GUIDELINES:**

1. Assure that the client is given a choice of providers when possible.
2. A referral information list of local health providers, hospital, health and social service agencies is maintained and available to the client. (Referral information list may be used to compile and maintain information. This list should be reviewed and revised as necessary.)
3. Assure the transfer of pertinent medical information to the referral provider, with the client's written consent.
4. Assure that referrals are fairly made to all providers giving acceptable quality of care.
5. Establish the method for follow-up for each type of referral. This should include:
  - a. the mode of contact: phone, letter, or registered letter
  - b. define the types of referral by the nature of the problem which will determine the timeframe for follow-up [emergency, urgent, essential and discretionary]
  - c. the minimum number of attempts that should be made to contact a client before a client is considered lost to follow-up
  - d. a system for tracking referrals made.
6. Define the referrals according to the category:
  - a. Medical referrals may include:
    - 1) general medical problem
    - 2) gynecological problem
    - 3) prenatal care
    - 4) infertility counseling/services
    - 5) genetic screening/counseling
    - 6) hospital care (emergency/in-patient)  
sterilization
    - 7) mental health
    - 8) other (specify).

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- b. Social Services may include:
    - 1) counseling services
    - 2) financial assistance
    - 3) State Children's Health Insurance Program (CHIP)
    - 4) child care, etc.
    - 5) problem pregnancy counseling
    - 6) legal aid
    - 7) psychological services (including counseling/family counseling)
  - c. WIC
  - d. OPOP
  - e. food stamp program
  - f. USDA extension.
8. Assurance that internal systems are developed which document:
- a. that recommended referral appointments were made within an appropriate period of time.
  - b. that these appointments are kept.
  - c. that providers return necessary client information to the referring agency.
  - d. action taken in response to recommendations received from the referral provider.
  - e. any comments the client makes about the referral provider.
9. Include procedures for follow-up that assure:
- a. that clients obtain the appropriate services
  - b. are sensitive to the clients' concerns for confidentiality and privacy
  - c. mechanisms for follow-up are negotiated at the first visit
  - d. that the negotiated method of follow-up is noted in the medical record.
10. For clients refusing referral and/or follow-up, a Refusal to Accept Referral/Recommended Follow-Up form must be completed (see appendix for form).

## Reference:

1. Program Guidelines for Project Grants for Family Planning Services, January 2001, p. 16, Section 7.4, Referrals and Follow-up.

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