Tracking Log Guide

Place Tracking Log sheets in a binder or notebook with dividers labeled according to the category of the referral, e.g., "Behavioral Health", "Cardiology" "Occupational Therapy", "Physical Therapy", "Radiology". Assign staff member for monitoring the Log weekly to ensure providers receive reports, or be aware if the patient failed to keep the appointment or if a response from the referral resource has not come in.

A competed Release of Information signed by the patient should be sent to all referral sources so they may communicate with the provider requesting the referral.

Date Column – Enter the date the referral was made

Patient Column – Enter patient name or other identifier

Referral to/for - Enter the name of the referral source and reason for referral

Sent – Enter date sent, or initials of individual completing the referral

Rcv'd – Enter the date a response was received, or put F to indicate the patient failed to keep the appointment

Chart – Enter initials of individual who place response on patient chart and sent chart to provider

Comments – Enter comments as needed, e.g., "Pt. notified of appointment" "Patient cancelled appointement"