

## Memorandum

**DATE** January 30, 2025

**TO** MemorialCare Select Health Plan (MCSHP) Primary Care Physicians Network

**FROM** MCSHP Quality Departments

**RE** Specialty Referral Tracking—Used & Unused Specialty Referrals  
(Audit Requirement for Medi-Cal & Commercial Members)

MCSHP Utilization Management Department distributes a bi-monthly Specialty Referral Tracking list for provider managers to track referrals and follow-up on used, unused referrals and missed appointments.

To meet compliance with health plans' audits requirements, there must be documentation of evidence of coordination of care between PCP and SCP and reflect that there is responsible utilization management. It is necessary for PCP offices to be able to furnish the following evidence document in the member's outpatient medical record the following:

1. There is evidence that the member was scheduled for requested services.
2. There is evidence that the consulting physician sent a letter, written report or discussed member's results with the referring physician. If results were communicated verbally in person or telephonically, evidence of PCP documentation of discussion should be in members medical records. *Documentation on the patient's medical record that shows results have been received from the specialist that PCP referred patient to.*
3. There is evidence that follow-up was conducted on a missed appointment. (if applicable)
4. There is evidence that there was a follow-up conducted on the referral if it remains open or unused.
  - Example 1: "Office staff called patient to inquire about why the referral was not utilized. Left message on patient's voicemail."
  - Example 2: "Office staff called specialist office to request notes from patient visit. Staff member indicated that patient never made an appointment / missed appointment on MM/DD/YYYY."

### How Provider Offices Can Meet and Support Compliance

#### What to do:

- Use MCSHP Specialty Referral Tracking list provided bi-monthly.
- Review list on a monthly basis for used, unused, and missed appointments.
- Check in the member's outpatient medical record for evidence that the consulting specialist sent a letter, written report or documentation verbally in person or telephonically discussion of member's results to PCP.
- Keep a log to track and follow-up on missing appointments and specialty consult notes (See example of tracking log below for your reference)



REFERRAL TRACKING LOG

Provider/Office:

Month/Year:

Submit Form

Date	Patient	Referred To/For	Appt Date	Appt Kept	Chart Notes	Comments
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	

I have read the content above and understand that this office will be held to those standards.

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Attestation Signature of Provider Representative

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Date

**Return signed attestation to:**  
[MCSelectQuality@memorialcare.org](mailto:MCSelectQuality@memorialcare.org) by Friday, February 07, 2025