

# Referrals and recalls checklist

- You or your practice staff make urgent referral appointments for the patient and the details are recorded in the patient's file
- Copies of referral letters are placed in the patient files
- Decide which patients/conditions require tracking/recalls
- Put in place a computerised or manual patient follow-up system to monitor referral compliance
- Have a recall system that is actioned during the consultation process to initiate tracking
- Allocate the responsibility of managing the recall mail-out system
- Staff are trained to ensure that attempts to contact or follow up patients are documented in patient files
- All staff should check if referral has expired
- Any patient scheduled for a recall appointment is appropriately identified in the appointment schedule to highlight the importance of the recall appointment