



## CHANGE IDEA: Automate referral follow-up alerts in the electronic health record (EHR).

### STEP 1: GET READY (TASKS)

- A. Obtain senior leadership approval to prioritize this task.
- B. Convene a planning team including providers, care coordinators, IT staff, and administrative leads.
- C. Assess EHR capabilities and learn from peer clinics using the same system.
- D. Review current gaps in referral follow-up for early intervention and specialty care.
- E. Confirm the benefits of automated alerts (e.g., fewer missed referrals, improved patient outcomes).
- F. Define the target population: all pediatric patients referred for external services.
- G. Assign roles: who configures alerts, monitors tasks, and follows up.
- H. Define process steps for your referral follow-up and alert system. See an [example process](#).
- I. Schedule training on the referral alert system.

### STEP 2: PLAN AND PRACTICE

- A. Configure alert logic: Trigger a task if 'Acknowledgment Received' is missing after 5 days and if 'Outcome' is missing after 14 days. See a sample [tip sheet](#).
- B. Pilot the process with one care coordinator and one provider over 2 weeks.
- C. Use the dashboard or task queue to track follow-up alerts.
- D. Log all actions taken in the EHR referral tracking notes.
- E. Collect staff feedback on alert usability and workload impact.

### STEP 3: REVIEW AND REFINE

- A. Conduct a review huddle at the end of the pilot period.
- B. Analyze how many referrals triggered alerts and whether follow-up was completed on time.
- C. Assess the accuracy of alert timing and task assignments.
- D. Discuss usability, barriers, and any unintended consequences.
- E. Identify needed changes to timing, messaging, or training.

### STEP 4: EXPAND

- A. Roll out alert tracking to additional providers and referral types.
- B. Provide refresher training and workflow support to new users.
- C. Monitor key metrics (e.g., percentage of referrals followed up within 14 days).
- D. Hold monthly team check-ins to support implementation and problem-solving.

## STEP 5: SUSTAIN

- A. Embed automated referral follow-up alerts into standard referral workflows.
- B. Include alert review and documentation as part of new staff onboarding.
- C. Monitor referral completion and alert resolution metrics quarterly.
- D. Share success stories and ongoing challenges during staff meetings.
- E. Maintain a feedback loop with IT and care coordination teams to support sustainability.
- F. Adjust alert timing, templates, or task routing based on user feedback and tracking data.
- G. Add default notes or checklists to reduce documentation burden.
- H. Update training guides and standard operating procedures.
- I. Incorporate staff improvement ideas into EHR design discussions.