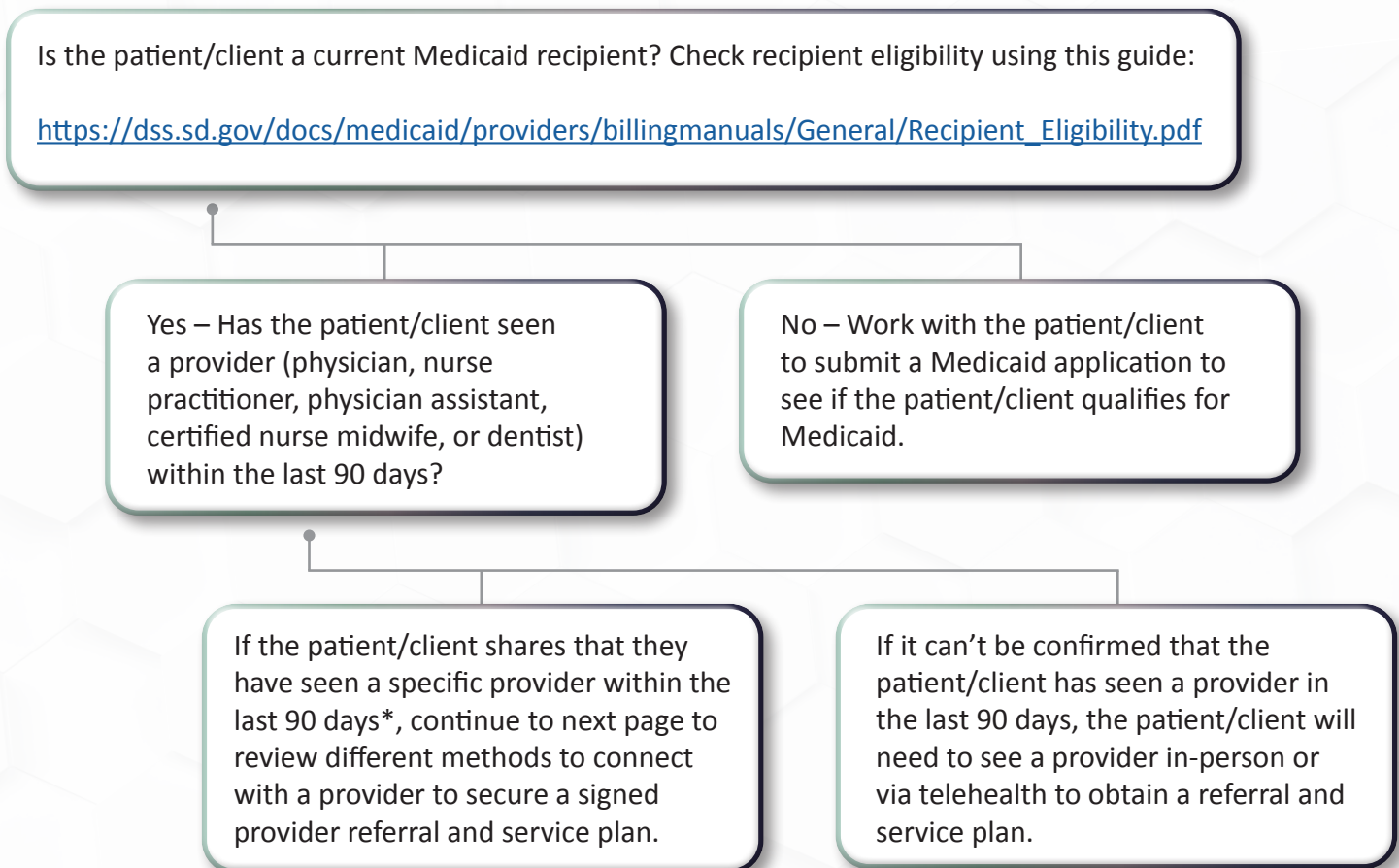


## Obtaining External Provider Referrals and Service Plans for Community Health Worker (CHW) Patients/Clients

The following workflow (or an adaptation of this workflow) should be used by community-based organizations and other organizations where a referral and service plan for CHW services is required from a provider not employed/associated within an organization.

It is important to note that a patient/client who is a Medicaid recipient must have seen a provider (physician, nurse practitioner, physician assistant, certified nurse midwife, or dentist) within the last 90 days prior to said provider signing a referral and service plan. A referral and service plan must be signed and dated PRIOR to a CHW beginning to provide CHW services that are being billed by a CHW agency on behalf of a Medicaid recipient.

The following workflow can assist CHWs and CHW agencies in ensuring that all steps are in place to secure a referral and service plan for a patient/client and bill Medicaid for CHW services provided:



\*Note: Organizations may also consider subscribing to SD Health Link to access the Health Information Exchange in order to confirm information shared by a patient/client regarding seeing a provider within the last 90 days. This can also assist the CHW agency in identifying the specific provider to contact. Learn more about SD Health Link here: <https://sdhealthlink.org/>.

## Methods to Initiate An External Provider Referral and Service Plan

Once it is confirmed that a patient/client has seen a provider within the last 90 days, it is then important to properly inform the provider of why a referral and service plan is needed prior to providing CHW services.

The following methods may be used to contact a provider to request (or request a signature for) a referral and service plan for a patient/client. The methods listed below are listed in order from most likely to least likely to lead to obtaining a signed referral and service plan for a patient/client in order to begin billing for CHW services provided to the patient/client as a Medicaid recipient.



### **Attend an Appointment with a Patient/Client**

A CHW may also consider attending an appointment with a patient/client to introduce themselves and ask the provider for a referral and service plan. This is also a great opportunity for the CHW to meet the provider and for the provider to meet the CHW and ask questions about the work that they do. Although likely most time consuming, this is the best way for a CHW to get a referral for a patient/client as the CHW is able to directly communicate with the provider and share an overview of possible services the CHW can provide.



### **Phone Referral and Service Plan Request**

A CHW may call the nurse or support staff of a provider to request a referral and service plan for a patient. The nurse or support staff of a provider can then share how the provider wishes to receive referrals and service plans (i.e., email, mail, fax).



### **Fax Referral and Service Plan Request**

A CHW may fax the provider or provider support staff to request a referral and service plan. The cover letter could be used as the fax cover message. The fax cover letter should also include the referring provider's name. This process may take time to establish, and providers, nurses, and support staff may take time to review and respond to the fax.



### **Secure Email Referral and Service Plan Request**

A CHW may use secure email to contact the provider or provider support staff to request a referral and service plan. The cover letter could be used as the email message. This process may take time to establish, and providers, nurses, and support staff may take time to respond to an email.



### **Mail Referral and Service Plan Request**

A CHW may mail the provider or provider support staff a letter to request a referral and service plan. A cover letter should be included, along with a return envelop and contact information. This will likely be the slowest process to obtain a referral and service plan and may not happen in a timely manner, especially if the CHW hopes to quickly begin billing for CHW services provided to a Medicaid recipient.



### **Have Patient/Client Share Referral and Service Plan with a Provider**

A CHW may send a referral and service plan with a patient/client to have them share with their provider in order to get a signed referral and service plan. While this is a low-effort approach to obtaining a referral and service plan, a patient/client may forget to ask the provider during their visit or may lose the paperwork prior to or after their appointment.

For more information and to access a sample cover letter, visit the Medicaid Implementation and Billing pages of the CHWSD membership website pages at <https://chwsd.org/chwsd-memberships/>.