

PATIENT INTAKE & REFERRAL TRACKER

Referral Intake Playbook

Track missing documents, assign the next action, and make the scheduling handoff clear.

Start with a referral that is stuck

Find what is missing, name the person who will request it, and record when they will check again. Work through the process using an existing UI Bakery template.

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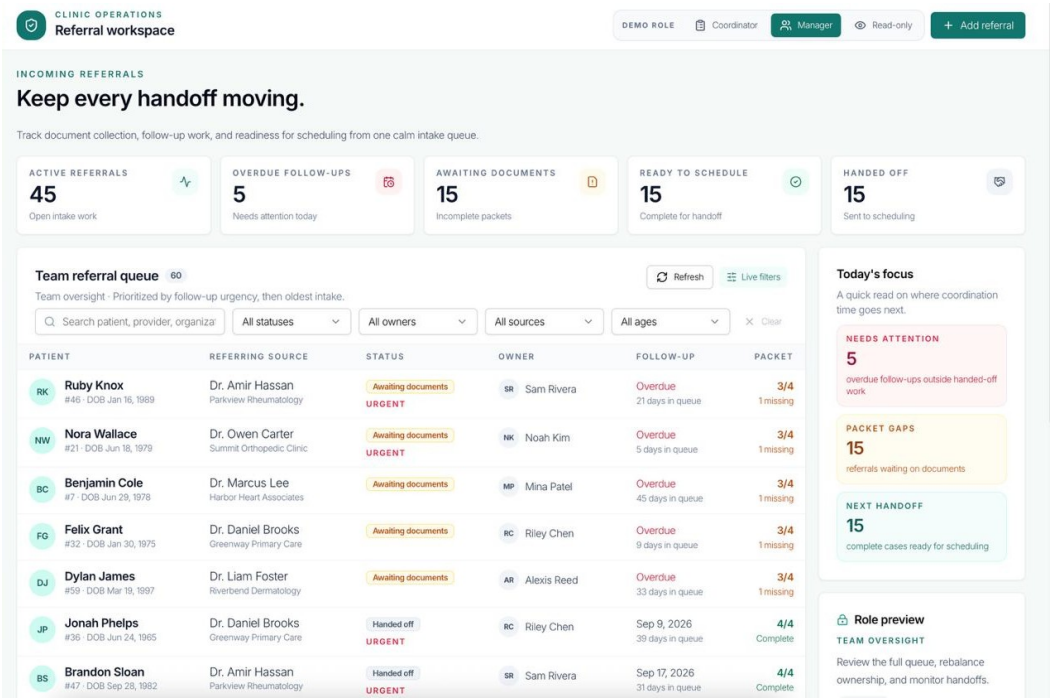
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For referral coordinators and clinic operations teams. Suggested administrative workflow; adapt it to your clinic before use. All worked examples are synthetic.

THE STARTING POINT

Use the existing Referral Tracker

The public Patient Intake & Referral Tracker is the app used in this guide.



Official template preview from uibakery.io. The worked example on page 4 is separate.

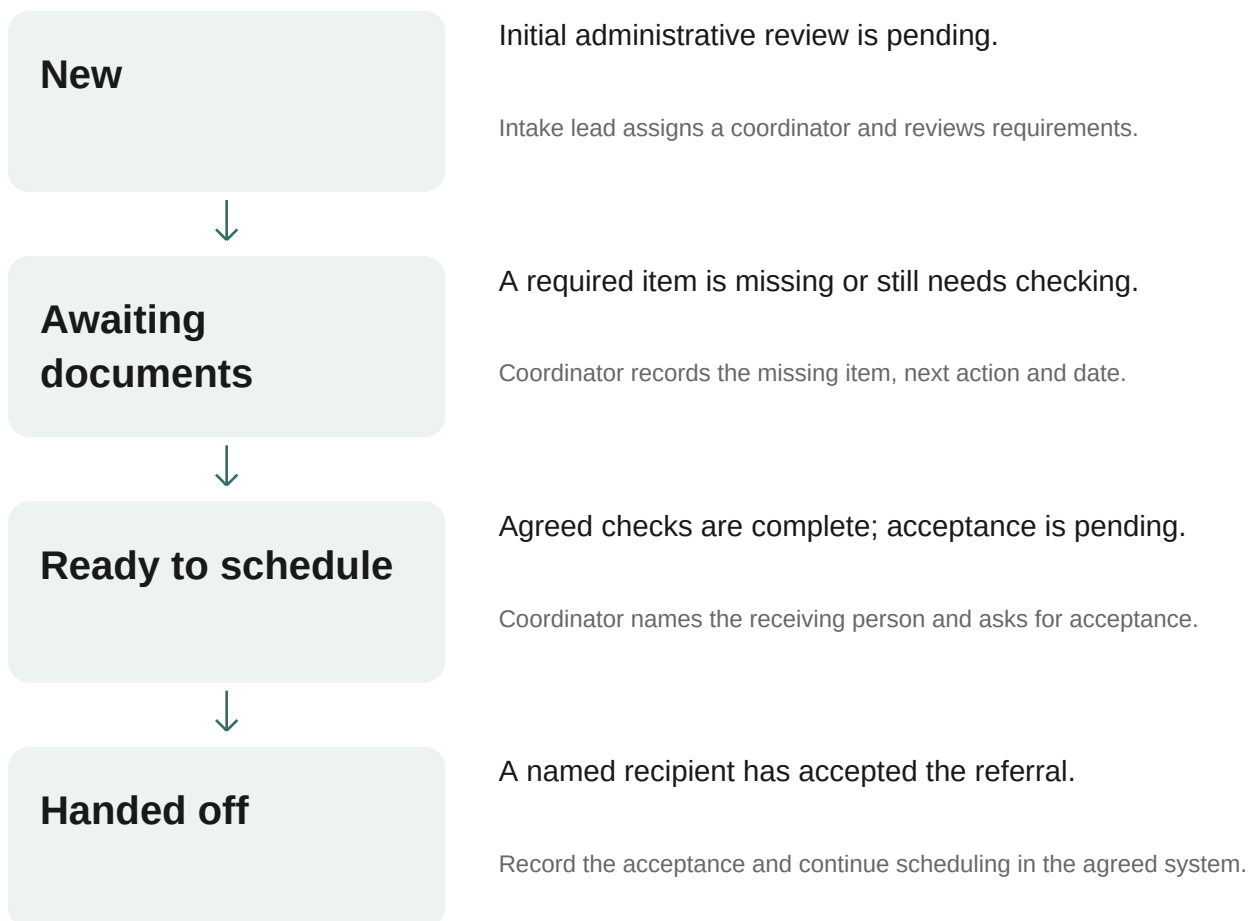
Available in the template	Decide for your clinic
Queue with status, owner and follow-up date	Who owns intake and covers absences
Document checklist, attachments and notes	Which documents your process requires
Filters, summary cards and activity history	When to review overdue work

Open the template and choose Clone this template

WORKFLOW DESIGN

From intake to accepted handoff

The four main labels below appear in the demo. The owner and acceptance rules are suggested team practices.



If intake finds no gaps, move directly to Ready to schedule after the agreed checks. If a new gap appears, return to Awaiting documents and record why.

Optional local rules: use On hold for an authorized pause with a review date; use Closed when an authorized person records why intake work is finished. These are suggested additions. A handoff does not mean an appointment is booked.

WORKED EXAMPLE

A missing-note case from intake to handoff

Fictional referral DEMO-001. Patient: Sample Patient 01. Dates and document rules below are illustrative. This case is included in the workbook.

When	What happened	Record in the tracker
Sept 30, 9 am	An intake form arrives. The example clinic policy also requires a referring-provider note, which is absent.	Owner: Coordinator A Awaiting documents Missing: Provider note
Sept 30, 10 am	Coordinator A requests the missing note through the approved channel.	Requested from Source A. Next: Check for receipt. Follow-up: Oct 1
Oct 1, 9 am	The note arrives. Coordinator A checks the agreed administrative requirements.	Record receipt and check. If incomplete, keep the remaining requirement explicit.
Oct 1, 11 am	The packet meets the agreed rules. Scheduler B accepts the handoff.	Ready for scheduling, then Handed off after acceptance. Accepted by Scheduler B: Oct 1, 11 am

If the note does not arrive

Keep the referral in Awaiting documents. Log the attempt, set the next action and date, and use the clinic escalation rule. Do not mark an item received to clear the queue.

This training scenario does not describe a real clinic, patient or measured outcome.

WALKTHROUGH / 1 OF 2

Find the gap. Set the follow-up.

Actual demo record: Felix Grant, referral #6. This is a separate synthetic record from DEMO-001. Repeat the exercise in your own template copy.

1. Open the record. On the template page, choose Clone this template. In a copy with the demo records, select Manager, search Felix Grant and open #6, not #46. If your copy has different records, choose one marked Awaiting documents.

Clinical notes REQUIRED Missing

Expected from: Referring provider Received: Not set

Last requested: Not requested No file uploaded

Upload Request again Mark received X

2. Read the missing item. Clinical notes is marked Required and Missing. The checklist shows 2/3 required items received; the queue shows 3/4 total, including the optional item. Keep the missing item open while waiting for its file.

Workflow status Owner

Awaiting documents Riley Chen

Next follow-up

01.10.2026 Update date

1 required document remains before Ready to schedule.

3. Confirm the owner and save a date. This record belongs to Riley Chen. Use Owner if reassignment is needed. Set Next follow-up to October 1, 2026 for this exercise, then click **Update date**. The screenshot uses day.month.year; your browser may display dates differently.

Checked in the live demo: the success message appeared, the preview date changed and the activity timeline recorded the update. Choose a suitable future date when running your own exercise.

WALKTHROUGH / 2 OF 2

Save the next action. Check the queue.

The saved note should explain the next action without implying that a request was sent or a handoff was accepted.

4. Save a referral note. Scroll to Referral notes, enter the text below in Add note, then click **Add note**. The note must appear above the input and in Activity timeline.

Referral notes

Morgan Blake

Sep 30, 2026, 10:38 PM

TRAINING EXAMPLE: Clinical notes are missing. Next action: check for receipt on Oct 1, 2026. Owner: Riley Chen.
Handoff acceptance: pending. Synthetic record only; no request sent.

Text used: TRAINING EXAMPLE: Clinical notes are missing. Next action: check for receipt on Oct 1, 2026. Owner: Riley Chen.
Handoff acceptance: pending. Synthetic record only; no request sent.

5. Close the record and search again. Search Felix Grant. Find #6 and confirm the saved follow-up date, owner and Awaiting documents status. Another referral for the same person may exist, so check the ID.

PATIENT	REFERRING SOURCE	STATUS	OWNER	FOLLOW-UP	PACKET
FG Felix Grant #46 · DOB Jan 30, 1975	Dr. Daniel Brooks Greenway Primary Care	Awaiting documents URGENT	RC Riley Chen	Oct 7, 2026 49 days in queue	3/4 1 missing
FG Felix Grant #6 · DOB Jan 30, 1975	Dr. Daniel Brooks Greenway Primary Care	Awaiting documents	RC Riley Chen	Oct 1, 2026 9 days in queue	3/4 1 missing

Expected result: #6 shows October 1, 2026, Riley Chen and 1 missing. Changing the date and adding a note did not complete the packet.

These screenshots show the tested result. Request again, file upload, document receipt and final handoff were not exercised in this walkthrough. Test those separately in your configured copy before relying on them.

REUSABLE CHECKLIST

Define what complete means locally

Use a separate row for each requirement. Confirm the list with your process owner before configuring the template.

Requirement	Required by / condition	State and evidence
Intake form (example)	Example clinic policy; all referrals in this training scenario	Received. Coordinator A checked the required administrative fields on Sept 30.
Provider note (example)	Example clinic policy; all referrals in this training scenario	Missing at intake. Requested Sept 30; follow-up Oct 1.
Your requirement: _____	Policy / referral type: _____	State / evidence: _____
Your requirement: _____	Policy / referral type: _____	State / reviewer: _____

Keep these distinctions in the notes

- Received:** a file or item arrived.
- Checked:** a person verified the agreed administrative requirement.
- Exception:** an authorized person documented why the usual requirement does not apply.

If your app uses a single checkbox, agree on exactly what it means. Use notes for reviewer, date and exceptions, or add fields during configuration. Extra fields are suggestions, not verified defaults.

DAILY OPERATIONS

Write a handoff someone can act on

Review overdue and unassigned referrals at the cadence your team agrees to. A date in the queue is not an automatic reminder.

Queue condition	Action to record
Owner is blank or absent	Intake lead assigns an owner or named coverage person.
Follow-up is due or overdue	Record the attempt, outcome, next action and next date.
Packet is ready	Name the receiving team and request handoff acceptance.

Copy this follow-up note

Referral: [ID]
Missing item: [specific requirement]
Action taken / channel: [what happened]
Outcome: [received, no response, or other result]
Owner / next action / due date: [name, task, date]

Copy this handoff note

Referral: [ID] | Checklist checked by: [name, date]
Open items or approved exceptions: [details or none]
Receiving team / person: [name]
Acceptance: [pending, or name and timestamp]

Use approved channels for patient information. Route clinical questions and urgency through your clinic's established escalation process.

SETUP & ACCEPTANCE CHECKS

Test the workflow before a live rollout

Start with a copy of the existing template and fictional records. Keep real patient information out of public demos.

- 1. Open the [official template page](#) and select **Clone this template**. Sign in or register as required.
- 2. Map statuses, document rules, owners and handoff criteria. Add fields or notes where needed.
- 3. Test the scenarios below in your configured copy.
- 4. Have the process owner review the result before connecting production data.

Test with a fictional record	Expected result
A required item is missing	The missing item is visible with an owner, next action and follow-up date.
Follow-up date is in the past	Find it in the overdue view. Verify date and timezone behavior in your copy.
Owner is removed	Identify the unassigned record and assign coverage.
An incomplete document arrives	Receipt does not silently count as a completed check. Notes state what is still missing.
Scheduling has not accepted	Distinguish the record from an accepted handoff.
Scheduling accepts	Record recipient and acceptance time in notes or configured fields.

Before real patient data, your organization must approve deployment, access, storage and integrations. This guide does not validate compliance or clinical suitability.

EDITABLE COMPANION

Use the editable workbook

Open referral-intake-checklist.xlsx, supplied alongside this PDF. It contains a filled workflow matrix and an editable document checklist.

Start here	What to edit
Workflow matrix	Review the stage rules, accountable owner, next action, date rule and exit evidence. Replace the suggested roles with your team roles.
Document checklist	Keep one row per referral ID and requirement. Select applicability and current state; fill in the owner, next action, date and evidence.
Filled examples	DEMO-001 has a checked intake form and a missing provider note. DEMO-002 shows received but unchecked. DEMO-003 shows a documented exception.
Your own exercise	Use the blank rows. Copy a whole blank row to extend the sheet, preserving its dropdowns and date formats. Use fictional IDs during setup.

Try this before using the sheet

In a copy, change DEMO-001 provider note from Missing to Received. It still needs an administrative check. Then record Checked, the reviewer, date and evidence. A person confirms readiness; the workbook does not calculate it.

The checklist snapshot is September 30; the handoff example on the matrix sheet is the later October 1 outcome. The workbook does not sync with the app or send reminders.

Sources and scope

UI Bakery: Patient Intake & Referral Tracker

Official description and preview image, accessed September 30, 2026. The template is public; this kit adds the walkthrough and working materials.

Version 1.0. Date and note saves were tested on synthetic demo referral #6. The suggested clinic workflow still needs review by your process owner. This guide does not cover clinical decisions or insurance submission.