

Nine points where referrals get lost



What goes wrong and what to measure at each point

● 1 to 7: intake through scheduling

● 8 and 9: visit and follow-up

1 Capture

Nobody is assigned to the referral when it arrives.

MEASURE

Inbound fax volume compared with referrals logged in the EHR.

2 Financial clearance

Coverage problems found late lead to denials and rework.

MEASURE

Share of referrals with eligibility verified before the first patient contact.

3 Incomplete referral

The referral waits on missing records.

MEASURE

Median age of referrals awaiting information, and closure rate of outbound records requests.

4 Speed to contact

Patients contacted sooner are more likely to book.

MEASURE

Median hours from referral receipt to first contact attempt.

5 Routing

Staff guess where to send referrals that lack a reason for consult.

MEASURE

The internal re-routing rate after booking or after the first visit.

6 Access

Waits often come from how the schedule is built.

MEASURE

Third-next-available new-patient appointment by clinician and visit type.

7 Show rate

Most cancelled appointments are never rebooked.

MEASURE

The cancellation rebooking rate within 7 and 30 days.

8 Readiness

Records or testing are missing, so the physician cannot decide at the visit.

MEASURE

Share of new-patient visits held with all required records and testing.

9 Loop closure

Poor follow-up with referring offices reduces future referrals.

MEASURE

Share of consult notes returned within 48 hours, and referral volume trend by referring practice.

Four changes that need no new software



Name one owner and one backup for every intake channel.



Acknowledge every referral to the referring office the same business day.



Have someone read the reason for consult at intake, so urgent referrals leave the first-in, first-out queue.



Work every cancellation as a rebooking task.

Measure your leakage rate with a two-week audit.

For two weeks, count the referrals your practice receives, logs in the EHR, schedules, and completes. The leakage rate is the percentage of received referrals that never reach a completed visit.

[Schedule a free audit](#)

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