

Referral Request, for Patient

Name Insurance Coverage In:

Plan #:

Family Name Covered Under Plan:

Individual Covered & Subject to This Letter:

Social Security Number of Individual:

Dear _____ (Your Physician)

The purpose of this letter is to obtain a referral to a specialist. I am seeking your approval for that referral. If possible I would like you to refer me to: _____ for the following reasons:

Please send me a copy of your referral or have someone in your office phone to advise me of its being done so we can get on with the medicine in the matter!

If you have any questions, call me as soon as convenient at:

Thanks, as usual, for your help and the fast service of your office in handling referrals.

Best regards,

Writer

Referral Request, for Patient Review List

This review list is provided to inform you about the document in question and assist you in its preparation. Your physician is on your side and frustrated with the paperwork related to getting referrals—even more than you are. So be a comrade in arms here.

Most physicians' offices now have faxes to send referral requests to. The more information you can send on your first request the profitable your account is and the less frustrated their staff will be with you. Therefore, get it right the first time and they will be on your side on a regular basis, especially if it is a small practice when they get to "know" the people (i.e., the "good" ones, the "bad" ones, the "crazy" ones, and so on and so on). You want to get on the "good" list. It will help you fight Insurance denial of claims and on and on.

If you do not know of a specialist, change the letter to reflect that. No need for a file; just keep the information paper clipped together in an open file and mark your calendar to call them in a few days if they haven't responded. If you have a fax machine at home, request them to fax back their response. This saves them time, money, and the pressure of a phone call. Emails are ok for some things; but in the document business, faxes work better, as a rule. If your doctor prefers email communication, though, use it.

Tip: Next time you are in the office, thank them for their help on referrals and ask your Doc how he or she likes to be communicated with on this and other matters. Few ask; you will stand out by doing so. You will also be able to give the Doc a little well deserved therapy as they complain about the process.