SPECIALIST REFERRAL PAPERWORK DESK

Build the baseline

Write facts and sources before filling the main table. Do not guess at missing information.

Project or subject

Date or period

STEP 1 List a document or administrative question for the appointment.

STEP 2 Record the source, person following up and review progress.

STEP 3 Confirm receipt or instructions directly with the relevant office.

STEP 4 Which fact or document still needs checking?

SPECIALIST REFERRAL PAPERWORK DESK

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

RECORD OR REVIEW DATE	PAPERWORK OR APPOINTMENT QUESTION	PERSON RESPONSIBLE	REVIEW PROGRESS	SOURCE, REQUEST AND NEXT CONFIRMATION

Outstanding question or record to confirm

SPECIALIST REFERRAL PAPERWORK DESK

Make the next step happen

Each useful action has an owner, a date and a result that can be checked.

ACTION 1 List a document or administrative question for the appointment.

Concrete next action	Owner / due

ACTION 2 Record the source, person following up and review progress.

Concrete next action	Owner / due

ACTION 3 Confirm receipt or instructions directly with the relevant office.

Concrete next action	Owner / due

IMPORTANT CONTEXT

This organizer does not validate referrals, eligibility or medical records. Confirm administrative requirements and clinical questions directly with the provider.

- [ ] Source checked
- [ ] Next action assigned