

Home Health Line Tool

Keep referral information close, avoid care delays by tracking key details

Tracking the elements below can help you monitor referral sources and the current status of patients in the intake process, ensuring that no one slips through the cracks. The information gathered with this tool, which should be confirmed by a clinical manager, can also be used to inform a shared, live referral log, as suggested by Ashlee Oliver, owner of JWO Home Health Consultants in Crown Point, Ind.

Referral Name: _____

Referral Source: _____

Date Received: ____ / ____ / ____

Is the patient appropriate for home health? Yes No

Do we have enough staff to accept this case? Yes No

Care status: _____

Valid F2F confirmed? Yes No (Date: ____ / ____ / ____)

Disciplines required: _____

SOC Scheduled? Yes No (Date: ____ / ____ / ____)

SOC Completed? Yes No (Date: ____ / ____ / ____)

Referral Name: _____ Jane Doe

Referral Source: _____ Dr. X Cardiology

Date Received: 10/31/2025

Is the patient appropriate for home health? ☒ Yes No

Do we have enough staff to accept this case? ☒ Yes No

Care status: _____ Accepted

Valid F2F confirmed? ☒ Yes No

Disciplines required: _____ PT, OT

SOC Scheduled? ☒ Yes No (Date: 11/2/2025)

SOC Completed? ☒ Yes No (Date: 11/4/2025)