



AMERICAN ANIMAL HOSPITAL ASSOCIATION

Referral

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TOOLKIT



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Meet Roger, official mascot of the
2025 AAHA Referral Guidelines

2025 AAHA Referral Guidelines

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ABSTRACT

Across the many types of specialty practitioners and hospitals, the requirements for veterinary patient referrals vary from one-time consultations to long-term case oversight and management. These guidelines propose a structured and technology-based approach to optimize the referral process for patients, clients, and veterinary teams. They emphasize a family-centered health care approach that keeps the focus on patients and clients through consistent collaboration between primary and specialty care teams. Collaboration between primary care teams and specialty care teams requires detailed and timely communication and medical records sharing. Veterinary clients also need content-rich and supportive conversations as they navigate often stressful clinical situations with their pets, including the realities of referral care costs, prognoses, and possible ongoing treatments and/or management of chronic conditions. These guidelines establish the concepts, roles, client communication strategies, and timelines that will promote successful referral relationships. Later sections offer detailed insights into the key responsibilities for the primary and specialty care team, from the initial contact before referral, through the referral itself, and then back to primary care team oversight. The final sections consider strategies to increase access to care using team optimization and telehealth, as well as possible obstacles in the referral process and how to address or avoid them. (*J Am Anim Hosp Assoc* 2025; 61:■■■■. DOI 10.5326/JAHA-MS-7489)

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These guidelines were prepared by a task force of experts convened by the American Animal Hospital Association. This document is intended as a guideline, not an AAHA Standard of Care. These guidelines and recommendations should not be construed as dictating an exclusive

protocol, course of treatment, or procedure. Variations in practice may be warranted based on the individual patient's needs, resources, and limitations unique to each practice setting. Evidence-guided support for specific recommendations has been cited whenever possible and appropriate. Other recommendations are based on practical clinical experience and a consensus of expert opinion. Further research is needed to document some of these recommendations. As each case is different, veterinarians must base their decisions on the best available scientific evidence in conjunction with their knowledge and experience.

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ABBREVIATIONS AND ACRONYMS

CVT (certified veterinary technician [e.g., CVT, LVT, RVT, LMT]); DV (directing veterinarian); NAVTA (National Association of Veterinary Technicians in America); PCT (primary care team); SCT (specialty care team); VCPRI (veterinary-client-patient relationship); VTS (veterinary technician specialist)

Resources for Veterinary Teams

Read the guidelines and download the tools at s.aha.org.



Episode #21: Amanda Donnelly, DVM, MBA



from the
SOAP BOX



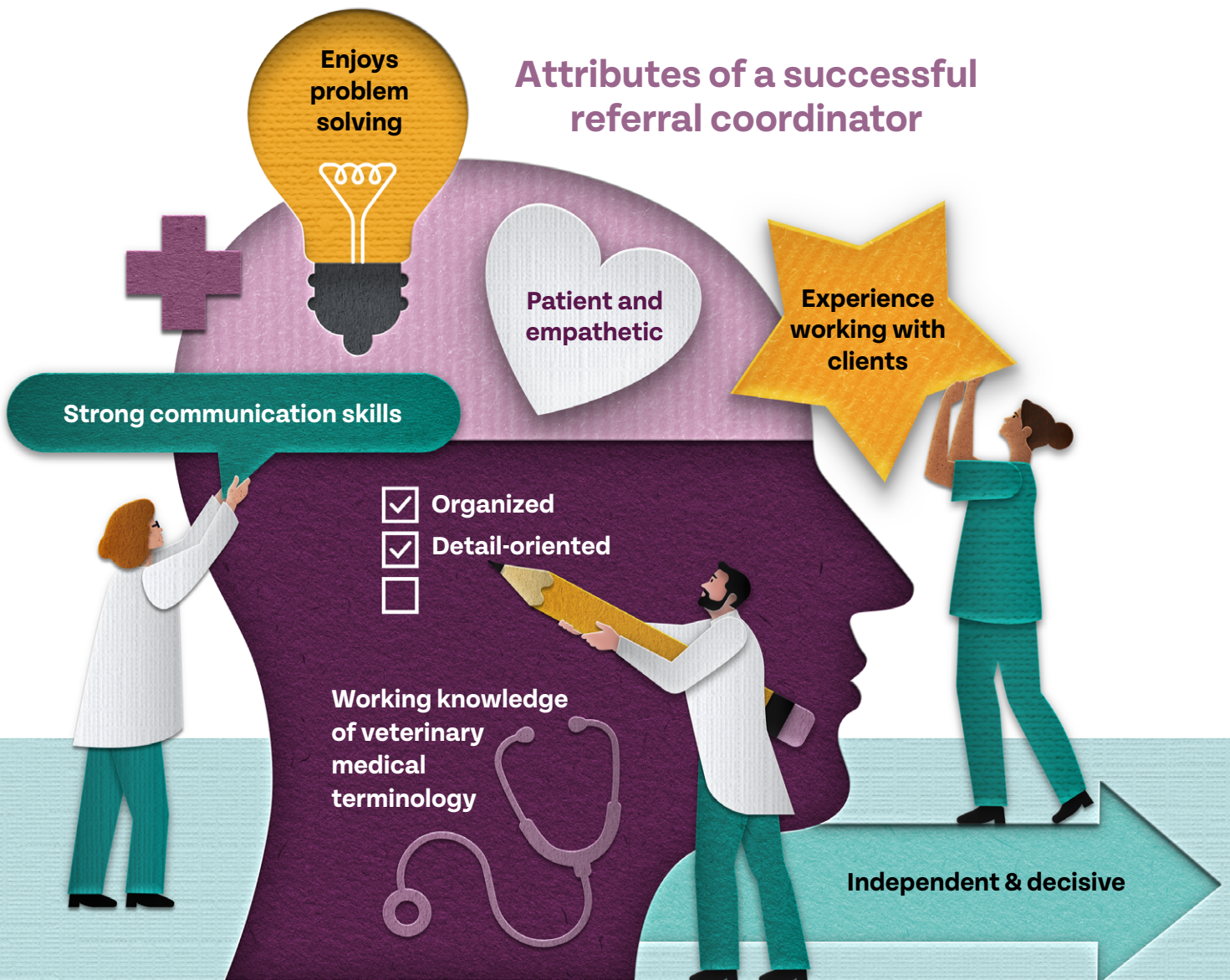
Dr. Amanda Donnelly discusses the referral process, client communication, and more on episode 21 of our podcast, *From the Soap Box*. Scan the QR code to listen now.

Referral coordinators: What they are and why you need one

When a patient needs a referral to the specialist, families often appreciate as much assistance from their primary veterinary team as possible. But taking the time to communicate with the specialty practice, especially when both the referring and specialty teams are typically very busy, can be challenging. It can be helpful to have one or more members of your team trained as a referral coordinator so that they are prepared to give the specialty practice—and your client—the exact information they need to facilitate a smooth referral process.

A referral coordinator may be someone you choose from within your team, whether that's a credentialed veterinary technician, a veterinary assistant, client service representative, or practice manager; or it may be a new role you hire for, which may mean bringing in an individual who does not have previous veterinary practice experience. In either instance, there are some key characteristics that will help improve a referral coordinator's proficiency in their role.

Attributes of a successful referral coordinator



8 Steps for Referral Coordinators in General Practice

- 1** Learn the referral protocols for each specialty practice: Do they have a referral coordinator you can reach, or is there someone else on the team you should reach out to? Do they have their own referral forms and/or a portal for general practices to upload records? What is their protocol for urgent/same day referrals?
- 2** For each case, prepare a list of information to provide during communication with the specialty practice. This should include:
 - Patient signalment (age, species/breed, spay/neuter status)
 - Reason for referral (GDV, neoplasia, CCL rupture, heart murmur, otitis externa, etc.)
 - Summary of diagnosis or chief complaint
 - Summary of diagnostics/treatment already performed
 - Urgency of referral (same day/emergency vs stable to wait for an appointment)
 - For same day referrals, how quickly the patient can arrive for referral
- 3** Plan to always ask the specialty practice for a cost estimate for the anticipated referral/diagnostics/treatment.
- 4** Be prepared to discuss alternatives to specialist referral with client if the proposed referral plan is not feasible for whatever reason.
- 5** Learn the preparation patients will likely need before their visit to the specialty practice: fasting, bringing all current medications, having a paper or electronic copy of records and any imaging results ready, check in protocols for the specialty practice upon arrival, etc.
- 6** Set expectations with clients so that they know when and with whom to follow up post-referral.
- 7** Be available for follow up questions or concerns from the client and specialty team if needed.
- 8** Create and maintain a list of local referral practices and their contact information for easy access. Visit aaha.org/referral or scan the QR code to download a fillable chart:



DOWNLOAD CHART

Specialty/Referral Chart

Name of practice/ specialist	Specialties offered	In person/mobile/ telehealth/teleconsulting	Website	Schedule	Phone number	Address
ABC Specialty Practice	Internal medicine, surgery, oncology	<input checked="" type="checkbox"/> In person <input type="checkbox"/> Mobile <input type="checkbox"/> Telehealth <input type="checkbox"/> Teleconsulting	www.abcspecialtypractice.com	M-F 8-9 S 8-1 24 hr care	(123) 456-7890	123 Main Street Anytown, USA 98765
Notes: Takes ER cases with call from vet; all pts should be fasted						
Dr. A Mobile Surgery Practice	Surgery	<input type="checkbox"/> In person <input checked="" type="checkbox"/> Mobile <input type="checkbox"/> Telehealth <input type="checkbox"/> Teleconsulting	www.vetmobilex.com	M-F 8-5	(555) 123-457	n/a
Notes: Surgeon will call client the night before to discuss case						
Dr. X neurology Consults	Neurology	<input type="checkbox"/> In person <input type="checkbox"/> Mobile <input checked="" type="checkbox"/> Telehealth <input type="checkbox"/> Teleconsulting	www.neurotelehealth.com	M-W 9-7	n/a	n/a
Notes: Client makes appointment through website						
Cardio EKG Consults	EKG consultation	<input type="checkbox"/> In person <input type="checkbox"/> Mobile <input type="checkbox"/> Telehealth <input checked="" type="checkbox"/> Teleconsulting	www.ekgconsult.com	M-F 9-5	(800) 555-1212	n/a



Optimizing patient referrals

Amanda Donnelly, DVM, MBA, a veterinarian, speaker, author, and business consultant, has been speaking up about the challenges primary care teams (PCTs) and specialty care teams (SCTs) face when managing the referral of patients for more than fifteen years. She has watched the referral landscape change and adapt as both PCTs and clients become more comfortable with the idea of specialty referral, and she has worked in both primary care and specialty care settings.

Having the perspective of a veterinary professional in each of these settings, as well as the perspective of a veterinary client, Donnelly shared her thoughts on the current challenges associated with veterinary referrals along with some expert advice on how to set appropriate expectations, foster trust, and help patients get the care they need as efficiently as possible.

Advances in technology often include access to a referral portal that allows for communication between PCTs and SCTs and easy sharing of medical records and patient updates.

How referrals have changed

Donnelly has noted multiple changes in the referral landscape over the years. For one, she said, the wait times to see a specialist are often much longer now than they used to be. “That’s particularly true for certain specialties, like cardiology,” she said. “There are not that many cardiologists, so it might take a long time to get in to see one.”

As a result, Donnelly said that patients who are in more critical need of a referral may sometimes need to present to a specialty practice via their emergency service to facilitate timely access to the specialty care they need.

Apart from availability of specialty appointments, Donnelly identified cost of care as an area of concern for veterinary clients in general and a “huge concern” for clients whose pets need specialty care.

She pointed to Synchrony’s Veterinary Specialty Care Study completed in partnership with CareCredit, which evaluated cost of care concerns from the perspectives of both pet owners and specialty care providers.

“One of the most eye-opening findings from that study was that 72% of pet owners said they were very or extremely concerned about the patient outcome, and 72% also said that they were very or extremely concerned about the cost of care,” Donnelly said.

“We have people now that are just as concerned about the cost of care as they are about how their pet’s going to do,” she added.

Not all the changes Donnelly sees are problematic, however.

“One of the aspects of the whole referral process that’s changed that is wonderful is the use of technology,” she said. Advances in technology often include access to a

referral portal that allows for communication between PCTs and SCTs and easy sharing of medical records and patient updates.

“Technology can also be leveraged to offer telehealth with specialists that might not have the opportunity to see the patient in person,” Donnelly added.

Setting up for success

In her work studying veterinary referrals, she has noticed a few key elements that, when done well, set all parties up for success. For starters, Donnelly said it’s important for PCTs to refer the patient, not the procedure. “A primary care doctor might refer a client over to the specialty care hospital, let’s say for an ACL surgery or refer the patient over for say an ultrasound,” she said. But then in some cases, the specialist decides that either there’s a different test that they want to do or a different condition that needs to be worked up in a different manner. That can lead to some confusion on the part of the client. “It can even erode trust,” Donnelly added.

Instead of telling the client which test or procedure their pet needs to have with the SCT, she recommends emphasizing that their pet’s care is being entrusted to the specialist and their team, and they will be the ones to make recommendations about appropriate next steps.

Another step PCTs can take to make the referral process much easier for SCTs is providing a written medical summary for each patient, Donnelly said. “Veterinarians might send pages and pages of medical records that now the specialty care hospital has to comb through and figure what’s going on with the patient,” she explained. She recommends providing a succinct written summary



Cost of care was identified as an area of concern for veterinary clients in general and a “huge concern” for clients whose pets need specialty care.

in SOAP form with the reason for the referral alongside the rest of the relevant patient records.

“If they have that brief summary, then it makes it a lot easier to have that continuity of care and that seamless referral process. And it creates a tremendous increase in efficiency for that case being worked up appropriately.”

Communication as an essential tool

When PCTs see a patient who needs to be referred, they often have to consider which diagnostics to complete prior to referral and which to hold off on. PCTs often consider how to help reduce the client’s financial expenditure while still providing sufficient workup to justify the referral and give the SCT what they need to move forward with the case.

This can include questions about whether to perform certain diagnostics like radiographs prior to referral, knowing that the SCT may end up wanting to take their own radiographs once the patient arrives.

“The clear answer is to increase and improve communication between primary care veterinarians and specialty care doctors,” Donnelly said. “Having those conversations over time can give you a sense of what the specialist wants you to do. Then you can try to use that as the model for future similar cases.”

This doesn’t just apply to diagnostics, she added. There can be situations in which a PCT has to decide whether to give medication prior to referral. In some instances, such as when patients are in pain, it can be helpful to administer medication to optimize the patient’s comfort and facilitate handling during transport to the SCT. In other cases, however, administration of medication prior to referral can interfere with the subsequent specialty evaluation and workup.

Knowing when to administer medication and when to hold off can sometimes be challenging, especially since individual practitioners may vary in their preferences. So just as with diagnostics, reaching out to the specialists to whom you refer is usually the best way to determine how to approach these cases when a referral is likely.

What has changed with the referral process over the years?

Video: Connected care: Strengthening and supporting the referral process



How can primary care teams determine how much of a workup is best to do before referral?



Click or scan QR code to view video



Amanda Donnelly, DVM, MBA is a veterinarian, speaker, and business consultant.

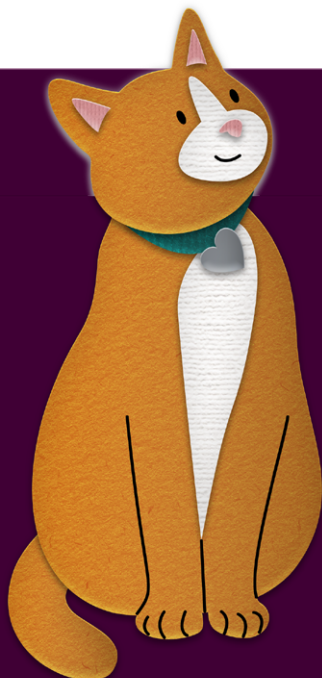
How to facilitate smooth referrals

Use these forms to support consistent, efficient referral workflows. The referral questionnaire helps gather key details from specialty facilities, while the progression chart provides a framework for tracking each step of the process.

REFERRAL FACILITY INFORMATION
Which species do you see? <input type="checkbox"/> Dog <input type="checkbox"/> Cat <input type="checkbox"/> Other:
Which specialties do you offer?
AVAILABILITY & EMERGENCY CARE
What is your operating schedule?
Does it include coverage for <input type="checkbox"/> Nights <input type="checkbox"/> Weekends <input type="checkbox"/> Holidays:
How far out are you scheduling appointments?
Do you see any patients on an emergency/urgent basis? <input type="checkbox"/> No <input type="checkbox"/> Yes:
If so, what is your preferred protocol for referring an emergency?
COMMUNICATION
Preferred methods of communication? <input type="checkbox"/> Phone: <input type="checkbox"/> Text:
Email:
Do you have a referral coordinator? <input type="checkbox"/> No <input type="checkbox"/> Yes, name:
How do you communicate with referring practices about mutual patients during and after a referral?
SERVICES
Do you offer any testing on an outpatient basis (hearing testing, ultrasounds, etc)?
Do you offer phone consultations with veterinarians for cases where referral may not be possible? <input type="checkbox"/> No
Do you offer any telehealth services? <input type="checkbox"/> No <input type="checkbox"/> Yes:
Do you offer any mobile services? <input type="checkbox"/> No <input type="checkbox"/> Yes:
FINANCIAL & POLICIES
What are your financing options?
Do you offer a professional discount for our employees' pets? <input type="checkbox"/> No <input type="checkbox"/> Yes:
How can we make the referral process to your facility run more smoothly?



Visit aaha.org/referral or scan the QR codes to download fillable versions of the forms.



Referral Progression Chart	
Patient Name:	Date:
Referring veterinarian:	
Specialty practice/veterinarian:	
Reason for referral:	

<p>BEFORE REFERRAL</p> <ul style="list-style-type: none"> <input type="checkbox"/> Discuss referral with client <input type="checkbox"/> Explain goals of referral <input type="checkbox"/> Offer cost estimate <input type="checkbox"/> Answer client's questions <input type="checkbox"/> Give client contact information so that they can make their appointment (if not urgent) <input type="checkbox"/> Discuss referral with specialist (if applicable) <input type="checkbox"/> Give case background <input type="checkbox"/> Describe PE findings and dx results <input type="checkbox"/> Explain reasons for referral <input type="checkbox"/> Ask for cost estimate <input type="checkbox"/> Discuss availability <input type="checkbox"/> Provide client and pet information to specialist <input type="checkbox"/> Provide documentation <input type="checkbox"/> Fill out referral form <input type="checkbox"/> Fax/email/upload medical records <input type="checkbox"/> Print records to send with client <input type="checkbox"/> Provide access to imaging results 	<p>DURING REFERRAL</p> <ul style="list-style-type: none"> <input type="checkbox"/> Answer calls/emails/portal messages from specialty practice if needed <input type="checkbox"/> Answer calls/emails/portal messages from client if needed <input type="checkbox"/> Determine if patient needs to return to the referring veterinarian or be transferred anywhere else for any portion of pet's care
<p>PREPARE PATIENT</p> <ul style="list-style-type: none"> <input type="checkbox"/> Disconnect fluids/cap IV cath <input type="checkbox"/> Send all food/medications <input type="checkbox"/> Ensure client has address and phone number <input type="checkbox"/> Note times, doses, and routes of any medications given <input type="checkbox"/> Advise specialty hospital of patient's ETA <input type="checkbox"/> Advise client if pet needs to be kept NPO 	<p>AFTER REFERRAL</p> <ul style="list-style-type: none"> <input type="checkbox"/> Determine when patient needs to be seen in GP hospital if needed <input type="checkbox"/> Ensure specialty records are uploaded into patient's chart <input type="checkbox"/> Contact client to answer any questions and check on patient <input type="checkbox"/> Schedule follow up appointments for exams, labwork, imaging, bandage changes, etc <input type="checkbox"/> Ensure client understands if/when they need to return to specialty practice/veterinarian for any ongoing care
<p>NOTES</p>	

Family-centered referrals

Alternatives to the typical referral pathway

Does this scenario sound familiar? You have a patient you want to refer to a specialist, but referral is not feasible due to cost, location, availability, or another reason. But your client is still interested in doing what they can, and your patient needs care.

In some cases, you may be able to find another referral pathway that prioritizes the high-quality care and expertise a specialist referral can provide in a way that works for your patient and their family.

These options won't be a great fit for every patient, but when they are, they can help improve access to care for your patients and their families when they need it most. Below are some examples.

Teleconsulting

When you have a case that would ideally be managed by a specialist but referral to them is not in the cards, you may be able to work closely with a specialist who can guide you while you continue to manage the case.

This can look like consulting with a clinical pathologist who works for your reference laboratory to determine additional diagnostics and appropriate treatment; sending radiology images or electrocardiogram tracings to a radiologist or cardiologist for interpretation and sometimes treatment guidance; or consulting with an oncologist or surgeon who can advise you of appropriate treatment options or even walk you through a surgery so that you feel more comfortable recommending and providing care to your patient.

Telehealth

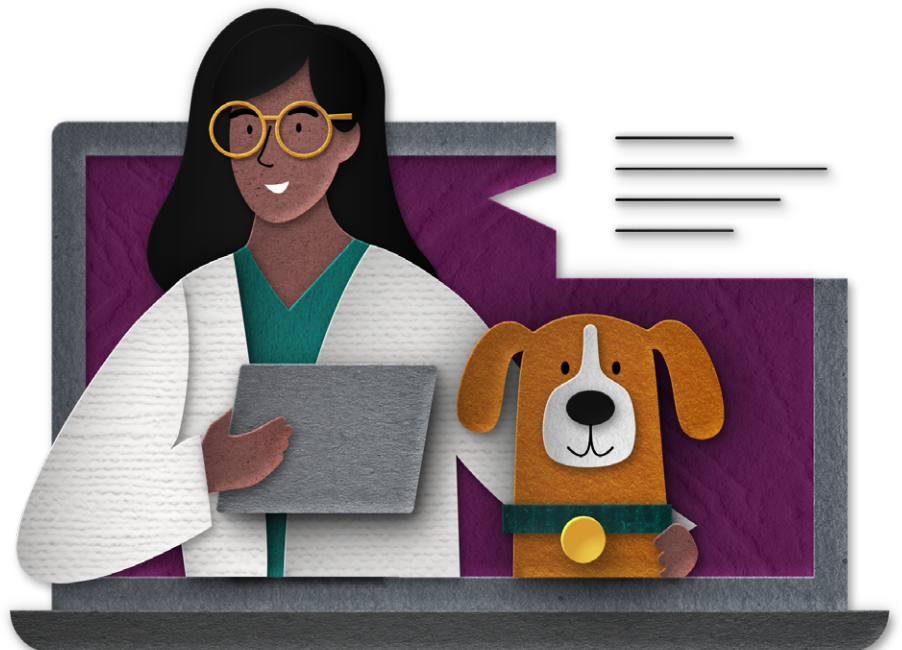
When your patient needs the supervision of a specialist but isn't close to one or can't get in to see one in a timely manner, telehealth may be a great alternative in some cases.

Specialties like behavior, neurology, dermatology, and others can be amenable to virtual consultations, where the client meets directly with the specialist without traveling to their clinic. The appropriateness of this option will depend on the pet's condition and well as state licensure and VCPR laws.

Mobile specialists

Can't get your patient to the specialist? Perhaps the specialist can come to you!

Some specialists, namely surgeons, cardiologists, internists, and others have chosen a mobile model in which they come to your practice to provide their service to your patient there. This can improve client and patient comfort since they stay with their trusted veterinary team, help keep more revenue in the practice, and in some cases result in financial savings to the client in comparison to the traditional specialty referral model.



Client Handout

Share this resource with pet parents when a referral is recommended to help set expectations and reduce uncertainty. It outlines the purpose of specialty care, key questions to ask, and how care is coordinated between your team and the specialist. Use it to reinforce conversations and provide a clear reference pet parents can review at home.



ALL ABOUT REFERRALS

Seeing a specialist

When your veterinarian recommends referral to a specialist for your pet, not knowing what to expect can feel scary. After all, you may feel very comfortable with the veterinary team who cares for your pet on a regular basis and be unsure about going somewhere new, on top of worrying about your pet's health. Here are some things to know about referral, how it can benefit your pet, and where to go for care going forward.

Reasons for referral

There can be many reasons your primary veterinary team may refer your pet to a specialist. In many cases, your veterinarian wants your pet to be evaluated by a veterinarian with specialty training and expertise who can provide additional insight as to your pet's diagnosis and/or treatment. Just like in human medicine, veterinary medicine has specialists that focus on areas like dermatology, surgery, internal medicine, oncology, behavior, dentistry, and more.

Benefits of referral

Specialty practices not only have teams that have advanced training in their field of expertise, but in many cases they also have specialized equipment to diagnose and treat your pet's condition and help them feel better faster. They are often the best place for your pet to be if they need round-the-clock hospital care, advanced surgery, or ongoing management of some chronic diseases.

Prepping for referral

When your veterinary team recommends referral, there can be a lot to think about, and it can be easy to get overwhelmed and not absorb all the information you are given. Here's a list of some of the questions you may want to ask your veterinary team about your upcoming referral:

- Where is the specialty practice located?
- Are there multiple referral options to choose from, and if so, how do they compare?
- Which type of specialist does my pet need to see? (examples: internal medicine, surgery, ophthalmology, dermatology, behavior)
- Who will make the first appointment—the veterinary team, or me?
- Do I need to bring any records with me, or is the veterinary team sending everything over?
- Does my pet need to be fasted before the appointment?
- Should I continue my pet's medications as prescribed prior to the appointment?
- Is my pet likely to have a procedure (such as diagnostic testing or surgery) on the same day as my first appointment?
- Can you give me a cost estimate for the initial appointment (keep in mind this is usually a rough estimate that may need to be modified once your pet is evaluated by the specialist)?
- Which forms of payment/financing do they accept?
- How urgent is the need for referral?

After referral:

Where to go for continued care

Once you have been referred to a specialist for your pet's care, it can sometimes be confusing to know when to go back to your specialist versus your primary care veterinarian. While each case is different, here are some general guidelines.

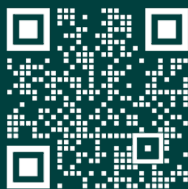
See your specialist team for:

- Follow up care and ongoing management of the condition for which you were referred to them
- Questions about the treatment they prescribed or performed
- Any concerns about complications from their treatment

See your primary care team for:

- Ongoing wellness and preventive care (vaccines, annual exams, parasite prevention, nail trims, etc.)
- Diagnosis and treatment of conditions that are unrelated to the reason you were referred to a specialist
- Refills of medications originally prescribed by your primary care veterinarian
- Paperwork like health certificates for travel
- General questions about your pet's health
- Follow up and any questions about the condition your pet was referred for if your specialist team has concluded their care of your pet or if they are not available
- In some cases, your primary care team may provide some ongoing management of your pet's condition in coordination with the specialist

Your primary care team and your specialist team share the same goal of prioritizing your pet's comfort and wellbeing. They will work together to provide the care that best meets the needs of your pet and your family.



Visit aaha.org/referral or scan the QR code to download the print-ready handout for your practice.



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