

Domain 3 Tool: Specialist Alignment Planning Worksheet

Purpose: A streamlined worksheet to help value-based care (VBC) entities identify priority specialties, clarify engagement goals, and outline next steps for improving referral alignment and collaboration between primary care physicians and specialists.

Use this worksheet to assess current referral practices, identify barriers, and capture actionable opportunities for improved coordination and network optimization. It can inform discussions with clinical, network, or contracting teams and serve as a living document for tracking progress.

Specialty Area	Problem/ Goal Statement	Current Referral Approach	Current Degree of Engagement	Barriers/ Challenges	Opportunities/ Potential Impact	Next Steps

Guiding Considerations for Each Column

Specialty Area

Focus on high-impact service lines (e.g., oncology, cardiology, orthopedics, behavioral health, neurology). Consider both urban and rural perspectives to ensure network adequacy and equitable access.

Problem / Goal Statement

Think about what you are trying to solve for or achieve. Define the key issue or objective for engagement, such as:

- Long wait times for appointments
- Fragmented communication between PCPs and specialists
- Lack of data transparency on outcomes or costs
- Underuse of high-value specialists

Current Referral Approach

Document how referrals occur today (e.g., self-referral vs. PCP-directed; open vs. narrow network).

- Are referrals patient-driven or PCP-directed?
- Are dashboards, analytics, market analysis used?
- Are there feedback loops for closed communication between PCPs and specialists?

Current Degree of Engagement

Describe the current relationship with the specialty:

- Strong: Active collaboration, data sharing, pathway participation
- Moderate: Periodic coordination, limited consistency
- Limited: Minimal structured engagement

Barriers / Challenges

Note what prevents improvement. Common barriers include:

- Entrenched referral habits or loyalty patterns
- Network or benefit design restrictions
- Variability in access (urban vs. rural)
- Lack of peer-validated data
- Limited incentives for PCPs or specialists to change behavior

Opportunities / Potential Impact

Describe measurable benefits of stronger alignment and what overall improvements could better specialist alignment achieve:

- Improved timeliness and access
- Increased referrals to high-value specialists
- Reduced leakage or unnecessary utilization
- Cost savings (Placeholder if not yet quantified)
- Improved patient satisfaction or continuity of care

Next Steps

Identify clear, actionable next steps, such as:

- Schedule a joint meeting or listening session
- Share referral analytics or dashboard data
- Align on referral criteria
- Pilot a condition-specific referral pathway
- Engage payer partners in reviewing benefit design barriers

Category	Top Findings / Notes
Priority Specialist	
Common Barrier	
High-Value Opportunities	
Recommended Next Steps (30-90 Days)	