

## JOB DESCRIPTION

Job Classification: Referrals Specialist

Reports to: Regional Administrator

Supervises: None

Last reviewed: 9/2024

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### POSITION PURPOSE:

Our referrals team is responsible for managing and coordinating patient referrals within our clinics.

This role involves close coordination with patients, healthcare providers, and specialist offices to facilitate seamless patient care and maintain accurate and up-to-date patient records.

### MINIMUM QUALIFICATIONS:

**Education:** High school diploma or GED required. Associates degree or higher in Health Information Management or a related field, preferred.

**Licensure/Certification:** RIHA/RHIT certification, or CEHRS certification, or CAHIIM certification, preferred

**Experience:** Two years or more of relevant work experience and a thorough knowledge of medical terminology. Knowledge of HIPPA guidelines, and federal and state laws governing disclosure of information.

**Equipment/Skills:** Multi-line phone system, Microsoft Office Suite (or equivalent). Electronic Health Systems (EHR/EDR) a plus. Familiarity with computer-based technology, e.g., insurance portals, insurance websites, etc.

**Physical demands:** Ability to physically perform the functions of the job, including sitting, standing, walking, lifting, carrying, bending, and reaching with or without reasonable accommodation.

**Status Classification:** Hourly

### PRIMARY RESPONSIBILITIES

- A. Initiates prior authorizations for patient referrals with accurate and necessary information to ensure requests are completed in a timely manner.
- B. Coordinates, processes, and sends patient referrals to specialist offices, including scheduling appointments and providing necessary patient information through the EHR and/or via fax.
- C. Ensure that referral requests are completed accurately and in a timely manner in order of urgency.
- D. Track and follow up on all referrals to ensure that reports are received from specialist offices. Generate and manage referral reports and track the status of all ongoing referrals.
- E. Communicate effectively with patients to explain the referral process, provide appointment details, and address any questions or concerns. Documents patient barriers to care, as appropriate, and assists in resolving those concerns.
- F. Ensures appropriate information is sent with the referral to avoid delays. Ensure accuracy of all demographics, such as address, and insurance verification.
- G. Maintain accurate and up-to-date patient records, including referral details and specialist reports, in the electronic health records (EHR/EDR) system.
- H. Ensure that all received records and reports are correctly filed and routed to the care team and integrated into the patient's record. Promptly completes any data entry based on clinical guidelines.
- I. Cross trains in front office functions (reception, records) as needed, to ensure high quality care.

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- J. Ensures compliance with outgoing record release regulations, including deadlines and information restrictions, and billing protocols.
- K. Ensures confidentiality of all patient information.
- L. Addresses and resolves any issues or delays related to referrals promptly and professionally and communicates these to the care team as needed.
- M. Navigate patient health records across all service lines, as appropriate.
- N. Demonstrates respectful, professional, and appropriate behavior that supports a team-oriented work environment.
- O. Attends and participates in staff meetings and trainings.
- P. Support clinic initiatives and meeting quality measures.
- Q. Participate in process improvement work.
- R. Works collaboratively with back-office teams to ensure the patients charts are comprehensive.
- S. Language Support Services. Duties:
  - Connect with Language Interpreting Services (i.e., LanguageLine) to communicate with patients in languages other than English.
  - For bilingual staff who have passed the QBS exam for your language, interact with patients in English and your QBS language as well as provide language support service to clinical staff.
- T. Performs other related duties as assigned. Standards:
  - Follows guidelines established at time of assignment.
  - Accepts assignments willingly.
  - Prioritizes workload to ensure timely completion of assignment.
  - Asks appropriate clarifying questions relative to scope of assignment.

ACKNOWLEDGMENT:

I have read and understand the above Job Description and agree with it.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date