

**Oconee Valley Healthcare
Referral Specialist
Job Description**

JOB TITLE: Referral Specialist
REPORTS TO: Medical Office Manager
SUPERVISES: None

DATE LAST REVISED: 3/28/2018

SUMMARY

The Referral Specialist functions as an integral member of the patient care team, providing a high level of customer service when coordinating referrals and diagnostic imaging orders to providers and other community resources.

RESPONSIBILITIES:

1. Identify and utilize cultural and community resources
 - Establish and maintain relationships with identified service providers.
 - Coordinate patient care with community partners utilizing available resources.
 - Establish expectations with specialists outlining timeliness on scheduling appointments and timeliness on returning consult notes.
 - Maintain an up-to-date list of all resources including maintaining a listing of specialists to be used for coordinating referrals for patients across all locations. Update the Specialist Listing according to the Update Referral Specialist Procedure, ensuring to consider the following for each Specialist: Insurance Acceptance, Whether or Not Specialist Provides a Patient Discount, Staff Feedback including amount of time to schedule patient appointment and time to return consult note, Patient Feedback, Information from the Medicare Physician Compare Website and NCQA Physician Recognition Website.

2. Create and Coordinate Referrals
 - Coordinate referrals to specialists as directed by Oconee Valley Healthcare's providers in a timely manner.
 - It is expected that the referral will be generated in a patient's Athena chart within 24 – 48 hours of receipt of request.
 - Ask Patients about any Self Referrals and Request Medical Records
 - When needed, plans for and coordinates services for patients who need special requirements such as communication needs / interpretive services and provides materials in spoken language of patient; takes special requirements into consideration when scheduling referral.
 - Ensure that the referral is created with all the data elements as outlined in the Referral Tracking Policy. The Referral Specialist is responsible for entering the following data:
 - i. **Referral Request Form:** Type of Referral, Referring To Provider (if not already completed), Authorization Code, Appointment Date / Time, Staff Member Assigned To, Status, Detailed Notes
 - ii. **Documentation sent as Attachments:** Expected Timing (at bottom of each referral), Allergies, Demographic Data (DOB, Sex, Contact Information, Health Insurance, Primary Language), Current Medications, Labs, Diagnostic Imaging, X-Rays, Current Treatment Plan, Clinical Finding, Substance Abuse, Behaviors Affecting Health, Patient / Family Self Care, Important Information about the Family, Medical History, Family History

- iii. Ensure that the provider has included the following in the referral: reason for referral, urgency (priority) of referral, reason for Urgent or Stat priority, type of referral (i.e. transfer of care, consult, co-management), diagnosis, specialty, any relevant cultural or ethnic information, communication needs, expected timing, follow up communication and procedures.
- Acquire an insurance authorization for referrals when appropriate and/or required by insurance (such as BC/BS, GA Better Health Care, WellCare, Amerigroup).
- Complete pre-certifications on all tests when required.
- Ensure complete and accurate registration, including patient demographic and current insurance information.
- Review details and expectations about the referral to patients.
- Send the Referral Request Information to the Specialist via Fax Server or Provider2Provider (P2P) when available
- Assist patients in problem solving potential issues related to the health care system, financial or social barriers (i.e. request interpreters as appropriate, transportation or prescription assistance)
- Coordinate with patients and specialist to establish an agreed upon appointment date/time for referrals which can be scheduled by Oconee Valley Healthcare staff.
- Inform patients of scheduled appointments via phone or mail.
- Be the system navigator and point of contact for patients and families with patients and families having direct access for asking questions and raising concerns. May assume advocate role on the patient's behalf with the carrier to ensure approval of the necessary supplies/services for the patient in a timely fashion.
- Once the appointment date/time has been established, complete and submit the referral. The referral then will be tracked by the referral specialists from the Needs follow-up inbox.

3. Referral Tracking

- Conducts follow up on outstanding referrals as outlines in the Referrals Tracking Policy:
 - i. Uses the Needs Follow-up inbox in Athena to monitor the status of outstanding referrals.
 - ii. Maintains ongoing tracking and appropriate documentation on referrals to promote team awareness and ensure patient safety, ensuring that referrals are addressed in a timely manner.
 - iii. Conducts follow-up with patients and/or specialists regarding outstanding consults and records these efforts in the action note section of the referral. Tracks referral until completion.

4. Create and Schedule Diagnostic Imaging Orders

- Schedule Diagnostic Imaging Orders according to Lab and Diagnostic Imaging Tracking Policy.
- Coordinate with the patient and the provider of imaging services to schedule an agreed upon appointment date/time.
- Once the appointment date/time has been established, complete and submit the referral. The referral then will be tracked by the Medical Assistant from the Needs follow-up inbox of the Ordering Provider.

5. Participate in Performance Improvement Efforts

- Provide input/feedback to representative on the Performance Improvement Committee and/or submit Performance Improvement Form(s) to share ideas on improvement of workflow, improvement of patient care experience, etc.

6. Ongoing Training

- Attend initial training and ongoing training as assigned to increase knowledge related to job position, patient safety, patient communication, coordinating care for patients, establishing relationships with community organizations, etc.

7. Establish and maintain a professional working relationship with Oconee Valley Healthcare providers.
8. Participates in daily huddle meetings
9. Maintains confidentiality of all patient information according to federal guidelines and regulations.
10. Perform other duties as assigned by the Director of Clinical Services and Oconee Valley Healthcare Administrative Staff.

EDUCATION, ESSENTIAL SKILLS AND EXPERIENCE:

- High school diploma or equivalent with 5+ years of medical office experience.
- Experience in a primary health care setting, nursing experience preferred.
- Strong customer service focus
- Effective verbal and written communication skills
- Teamwork orientation
- Organized and able to manage competing priorities
- Good judgment
- Resourcefulness in problem solving
- Able to take and follow through with delegated tasks and accountability
- Commitment to the concepts of preventive health care program and team approach to health care delivery
- Ability to learn about patients and their problems

Requires sitting or standing for long periods of time, working in an office and clinical environment. Able to stoop, kneel, bend at the waist, and reach on a daily basis. Able to lift and move up to 25 pounds occasionally. Working under stress and use of the telephone required. Manual dexterity required for use of calculator and computer keyboard and other office machines. Hearing and vision corrected to normal range. Must be a team player and possess excellent customer service skills.