



## JOB DESCRIPTION: MEDICAL REFERRALS SPECIALIST

### SUMMARY:

This position will be responsible for specialty referral management, referral coordination, and patient scheduling in support of Compassionate Family Medicine's (CFM) physicians, providers and their patients.

### DUTIES AND RESPONSIBILITIES:

The primary role of the Medical Referrals Specialist is to support CFM's physicians/providers in their effort to manage patient specialty referrals and to facilitate patient scheduling within the CFM's selected specialty provider network and/or list of local community resource organizations.

- Receives incoming referral requests from CFM's physicians/providers.
- Verifies eligibility and reviews patient demographics.
- Researches, investigates and develops an understanding and expertise regarding the ability of CFM's specialty provider network and how they meet the needs of CFM's patients with specialty referrals requests.
- Engages patients by telephone to discuss referral requests and appointment needs when necessary.
- Coordinates referral requests with physicians/providers, specialty practices, community resource organizations and with other clinical consultants as appropriate.
- Schedules patient appointments by contacting specialty physician practices or scheduling directly in an electronic medical record (EMR) when appropriate.
- Confirms appointments and/or referrals with physicians/providers and their patients.
- Communicates with physicians/providers and their patients, as needed, regarding referral management expectations and guidelines.
- Supports the development of CFM's specialty providers database, as well as community resource organizations, keeping contact information current and up-to-date.
- Assures that all necessary documentation and data collections occurs in a timely manner within the EMR system.
- Contributes to critical data capture, reporting and understanding.
- Supports other departmental team members to assure turnaround time expectations are met.
- Assists in the audit of physicians/providers referral management process and supports the development of effective referral management services for CFM.
- Respects patients by recognizing their rights; maintaining confidentiality.
- Communicates effectively with respect of differences in cultures, values, beliefs and ages, utilizing interpreters as needed.
- Maintains quality service by establishing and enforcing organization standards.



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### **QUALITY IMPROVEMENT ACTIVITIES**

***(PCMH, DSRIP, CPC+, APC, HEDIS, Value-based Programs and future programs)***

- Collaborates with team members and assist patients by reviewing and responding to all individually assigned Triage/ Documents/ To-do's daily.
- Referral Tracking – Following up on open referrals made within the system and/or obtaining information from specialist.
- Test-tracking – Following up on open orders (lab/imaging) made within the system and obtaining reports and reminding patients.
- Updates patient information as needed.
- Participates in quality improvement and utilization review activities
- Participates in establishing department/organization goals, identifying priorities, and implementing and evaluating quality improvement efforts.

### **QUALIFICATIONS:**

- Associates' degree (A.A.) preferred or High school diploma with 1-2 years related experience.
- Knowledge of medical terminology.
- Ability to work collaboratively with multiple health professionals in a busy and complex environment using tact, diplomacy, and discipline.
- Ability to understand and adhere to established policies, procedures, and protocols.
- Strong documentation skills.
- Ability to effectively communicate with people at all levels and from various backgrounds.
- Commitment to excellence and high standards.
- Excellent written and oral communication skills.
- Strong organizational, problem-solving, and analytical skills.
- Ability to manage priorities and workflow.
- Versatility, flexibility, and a willingness to work within constantly changing priorities with enthusiasm.
- Demonstrates good judgement with the ability to make timely and sound decisions.
- Bilingual skills a plus.
- Ability to understand and follow written and verbal instructions.

### **PHYSICAL/MENTAL REQUIREMENTS:**

While performing the duties of this job, the employee is frequently required to do the following:

- Sitting for prolonged periods.
- Understand and respond to a diverse population.
- Utilize visual, auditory, verbal, and olfactory processes required to assess, monitor, and care for patients.
- Interpret complex laws, regulations, and/or policies.
- Coordinate multiple tasks simultaneously.



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**WORK ENVIRONMENT:**

- Works in a clinical setting where employee may be exposed to blood-borne and airborne pathogens or infectious materials.

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**Medical Referrals Specialist**

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**Ted J. Triana, D. O.**

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**Signature**

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**Date**

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**Date**