



## Job Description

### Patient Referral Coordinator Administrative Medical Assistant

**Date:** March 23, 2023

\_\_\_\_\_ Exempt  Non-Exempt

**Department:** Health Center

**Compensation:** \$18.00 to \$23.73 per hour

Written By: Cheryle Pickle, CMPE  
Approved By: Karin Hennings,  
Administrative Director/CEO

**Reports To:** Health Center Manager

#### **Job Summary:**

The Patient Referral Coordinator manages the referral process for patients who require specialized care beyond the scope of their primary care physician. Primary responsibilities include ensuring that referrals are processed promptly and efficiently, requesting appointments with specialists, and effectively communicating with patients and healthcare providers about the referral process and progress. The Patient Referral Coordinator adheres to the principles of service and the philosophy and mission of Del Puerto Health Center in all aspects of job performance. The Patient Referral Coordinator assists and supports the Health Center Supervisor and the Health Center Manager in accordance with current policies and procedures, guidelines, regulations, and applicable federal, state, and local standards.

#### **ESSENTIAL DUTIES AND RESPONSIBILITIES:**

The *Patient Referral Coordinator* will be required to perform all duties for the assigned area. The requirements below represent the required knowledge, skills, and abilities. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions. Other duties may be assigned.

#### **Referrals and Authorizations**

1. Ensure timely processing and submission of physician referrals for specialists, durable medical equipment (DME), and medication.
2. Adhere to Referral Tracking Policy and Procedures to obtain patient referrals and authorization.
3. Accurately document patients' referral progress and approval information in the Electronic Health Record (EHR). Document all actions to ensure staff and providers are aware of referral progress.
4. Ensure the specialist's office is in-network with the patient's insurance.
5. Verify patient eligibility with insurance carriers through effective communication.
6. Update and scan patient medical records to maintain accurate records.
7. Securely submit patients' medical records to support authorization requests.
8. Obtain pre-authorization, if required, for the patient's treatment.
9. Schedule patient appointments with healthcare providers as necessary.
10. Conduct meticulous follow-ups on all referrals to ensure efficient processing and timely completion.
11. Promptly follow up with patients and office referrals/authorizations to ensure continuity of care.

12. Answer and respond to phone calls/voicemails in a timely manner and document them in EHR.
13. Maintain updated referral/pre-authorization forms for proper submission to specialist and/or insurance carrier.
14. Cultivate positive and professional relationships with insurance carriers and physician offices.
15. Communicate professionally with patients to provide updates on referral progress and appointment scheduling.
16. Perform other duties as assigned by the Health Center Supervisor and/or Health Center Management.

### **Principles Of Service**

In order to excel in this role, the incumbent must perform our principles of service to a satisfactory standard. The requirements below represent the required knowledge, skills, and abilities.

1. Maintain a professional demeanor in all interactions with patients, family members, providers, office staff, members of the community, and external agencies.
2. Handle confidential and protected health information (PHI) appropriately, understanding the importance of confidentiality and non-disclosure in accordance with HIPAA guidelines.
3. Demonstrate proficiency using Microsoft Office Suite and electronic medical/health records.
4. Demonstrate cultural sensitivity and work effectively with ethnically diverse populations.
5. Attend general and medical staff meetings as required.
6. Keep the office area assigned to you clean and organized.
7. Request office supplies when needed for your area.

### **EDUCATION**

- High School Diploma or GED
- Certified Medical Assistant (Preferred)

### **CERTIFICATIONS**

- Current Cardiopulmonary Resuscitation Card (CPR)
- Typing certificate 35 wpm

### **EXPERIENCE**

- Minimum 1-year medical front office experience, preferred

### **LANGUAGE**

- Bilingual English/Spanish, preferred

### **OTHER SKILLS and ABILITIES:**

- Speak, read, and write English fluently. Can record information accurately in English.
- Outstanding customer skills with sensitivity towards patient rights.
- Excellent communication skills; intermediate to advanced phone skills.
- Excellent organizational skills.
- Knowledge of medical terminology and common medical office clerical procedures, including computerized billing and accounts payable systems.
- Ability to operate office equipment (copy machine, fax, adding machine, scanner, and computer)

- Ability to multi-task and work effectively in a high-stress and fast-moving environment, utilizing good decision-making skills.
- Flexibility and willingness to work on an as-needed basis to meet the health center's operational needs.

**PHYSICAL DEMANDS:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit, use hands to finger, handle or feel objects, tools, or controls, reach with hands and arms, and talk or hear. The employee is occasionally required to stand, walk, climb, or balance, stoop or crouch.

The employee may occasionally lift and/or move up to 40 pounds and push up to 100 pounds on wheels. Specific vision abilities required by this job includes close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus. (See complete "Physical Requirements" attached).

**WORK ENVIRONMENT:**

The business office work environment characteristics described here are representative of those they encounter while performing the essential functions of this job.

**RISK EXPOSURE CATEGORY I:** Risk of exposure to blood/body fluids, based on Health Clinic location

**DISCLAIMER:**

This job description indicates the critical features as described under the headings above. They may be subject to change at any time due to reasonable accommodation or other reasons. The incumbent may be asked to perform other duties as assigned.

**ADDITIONAL INFORMATION:**

All your information will be kept confidential according to EEO guidelines. Del Puerto Health Care District is an Equal Opportunity Employer – Minorities, Females, Veterans and individuals with disabilities are encouraged to apply. Del Puerto Health Care District participates in E-Verify during the hire process at its location for all new employees.

# JOB DESCRIPTION-PHYSICAL REQUIREMENTS

**TITLE:** Patient Services Representative

Please check one box below in Section I and Section II which apply to this job description. Comments can be made in Section III.

C = Constant (76-100%) F = Frequent (51-76%) O = Occasional (26-50%) S = Seldom (1-25%) N = Never (0%)	E - Regardless of frequency, this activity is indispensable. M - This activity is useful and helpful but not absolutely essential.
--	---

	Section I	Section II					Section III		Comments:
Basic Skills:	C	F	O	S	N	E	M		
Reading	X					X			
Writing	X					X			
Math	X					X			
Talking	X					X			
Hearing	X					X			
Physical Demands:	C	F	O	S	N	E	M		
Sitting		X				X			
Standing		X				X			
Walking		X				X			
Stooping		X				X			
Crawling		X				X			
Climbing			X			X			
Reaching Overhead		X				X			
Crouching		X				X			
Kneeling		X				X			
Balancing		X				X			
Pushing or Pulling (10-100 lbs)			X			X			
Lifting or Carrying		X				X			
10 lbs. or less		X				X			
11 to 25 lbs.		X				X			
26 to 50 lbs.		X				X			
51 to 75 lbs.			X				X		
76 to 100 lbs.			X				X		
Over 100 lbs. (assist lift)				X			X		
Moving Patients				X			X		

(DWN14.TXT)

**Candidate's Statement**

I have reviewed the position physical qualification assessment for the job I am applying for. To the best of my knowledge, I am physically capable of safely performing the tasks identified.

I understand that any omission or misrepresentation of material fact in this application may result in refusal of or separation from employment. I hereby authorize the company to make any investigation of my background deemed necessary regarding employment. I have no objection to making application for security clearance, if necessary, signing an employee agreement on confidential information and inventions or taking a medical examination. I agree to abide by all company safety and health rules and to use protective equipment as directed by my supervisor.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date