



**VALLEY HEALTH TEAM**  
LIVE BETTER. VIVE MEJOR.  
JOB DESCRIPTION

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|-----------------------|-----------------------|
| POSITION:             | REFERRALS SPECIALIST  |
| REPORTS TO:           | HEALTH CENTER MANAGER |
| POSITIONS SUPERVISED: | NONE                  |
| CLASS:                | REGULAR               |
| CAT:                  | FULL-TIME             |
|                       | NON-EXEMPT            |

**BASIC FUNCTIONS:**

The Referrals Specialist will provide assistance to patients in the area of referrals, pre-authorizations, education of process and quality of care. The position is specifically responsible for assisting patients with the completion of referral, answering questions regarding process, and processing referrals received from providers.

**DUTIES AND RESPONSIBILITIES:**

1. Assist patients with completion of referrals, answering questions regarding process, and processing referrals received from providers.
2. Oversee all referral activity with assigned providers and ensure the quality of care is being provided to the patients, including the appropriateness of referrals and services being rendered.
3. Initiate referral process including necessary tracking and documentation.
4. Maintain a current list of outside Specialists/Specialties which includes referral forms, prescriptions, CPT listings, and DX requirements.
5. Document all communications and details during the referral process in electronic tracking system and electronic health record; utilize these systems to obtain all necessary information and document all referral processing steps.
6. Request medical records from outside Specialist/Hospitals., etc.
7. Conduct appointment scheduling in Practice Management System.
8. Maintain office equipment and supplies – includes reporting of IT or facility-related issues.
9. Maintain documentation and status of the specialty referral throughout the process.
10. Responsible for the coordination of referral requests with multiple service lines, including in-house, non-primary care specialty services and outside medical specialty services; referrals to hospitals, home health, dental, etc. and obtaining hospital pre-admission as required from the various health insurances and health plans.
11. Handle any ongoing communication between the specialist office, ordering providers and patients to ensure an effective working relationship.
12. Provide exceptional customer service and problem solving techniques in an attempt to further the patient's overall health and well-being via specialty care referrals.
13. Coordinate with various insurance carriers to obtain necessary authorizations and pre-certifications for patients to receive necessary services.
14. Schedule patient appointment with specialists as applicable and provides constant communication to the patients regarding the process and referral status.
15. Follow up on referrals processed to determine number of referral appointments cancelled or kept, whether documentation was provided by the specialist to the ordering provider and any necessary documentation in chart completed.
16. Ensure any pending referral with missing information is appropriately closed and communicated to provider team.
17. Serve as a resource to patients and staff who have questions about referral related items.
18. Provide orientation on the referral process to the new providers and periodic in-services to existing providers and staff regarding referral process.
19. Ongoing process analysis and streamlining with all internal referral processes.
20. Responsible for submitting referral activity reports to supervisor in order to monitor performance.

21. Fulfill specific referral productivity metrics as assigned and directed.
22. On a temporary basis, may be required to work at any satellite facility.
23. Contribute to team effort by assisting other departments as needed and while maintaining confidentiality of VHT's business.
24. Work cooperatively with all staff members and outside sources in a professional manner to deliver a high level of service.
25. Observe and practice all VHT Patient Experience Service Standards as outlined in "World Class Practices: My Commitment to Care (which I have read and signed). Practice CICARE when interacting with patients, their families, visitors, or internal customers.
26. Practice CICARE phone etiquette during all phone interactions.
27. Always exercise courtesy whenever patients, family members, visitors and co-workers are present.
28. Respect privacy and dignity of our patients, family members, visitors and co-workers.
29. Maintain professionalism in the presence of patients, their families, visitors and co-workers.
30. Act as a role model, verbally and behaviorally demonstrating skill, enthusiasm, positive problem solving, commitment and loyalty to the profession and the organization.
31. Follow applicable regulations: Joint Commission, OSHA, HIPAA, and CLIA.
32. Serves and protects the practice by adhering to professional standards, policies and procedures, federal, state, and local requirements, and The Joint Commission Accreditation of Healthcare Organization standards.
33. Perform other related duties, which may be inclusive, but not listed in the job description.

**MINIMUM QUALIFICATIONS:**

1. High School Diploma or GED equivalency; completion of accredited Medical Assistant program preferred
2. Minimum one (1) year work experience in a medical setting and/or knowledge with coordinating referrals
3. Current Basic Life Support
4. Strong customer service skills (preferably within a service industry)
5. Ability to process analyze and streamline processes
6. Ability to communicate effectively, both verbal and written
7. Must have strong organization skills, ability to multi-task
8. Modern office practices and procedures (including email)
9. Fluent conversational English/Spanish or English/Punjabi preferred
10. Ability to be flexible with work schedule and available to work at all site locations
11. Must have own transportation, valid California Driver's License and current proof of automobile insurance coverage
12. Demonstrated ability to provide world-class patient experience using CICARE principles and practices. Ability to be proactive and to go above and beyond the call of duty; take initiative to provide a world class patient experience in all encounters via email, phone or in person

**TYPICAL WORKING CONDITIONS:** The office setting is a normal work environment. Occasionally work during early morning, evening or weekend. May be subjected to temperature variances in the office.

**TYPICAL PHYSICAL DEMANDS:** Requires sitting, standing, or walking for up to eight hours a day. Some bending, stretching, or reaching may be necessary. Lifting up to 40 pounds may be required on occasion. Vision must be correctable to 20/20 and hearing must be in the normal range for telephone contact.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing 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 may come in contact with hazardous equipment such as liquid nitrogen, cleaning agents, and sharps. The noise level in the work environment is usually moderate but may become excessively loud with the increased patient flow during a busy clinic day.

I, the employee, understand the responsibilities and standards of my position as listed above, and I agree to fulfill them to the best of my ability. I understand I am an at-will employee and can be terminated at any time with or without cause. I also understand the Valley Health Team Inc. will not be responsible in any manner for termination's which are due to defunding of Federal or State Contracts. I also agree that the VHT Board of Directors have the right to modify the Personnel Policies which govern my employment at any time.

This organization is an Affirmative Action Equal Opportunity Employer. It is our policy to comply with all applicable state and federal laws prohibiting discrimination in employment based on race, age, color, sex, religion, national origin, or other protected classification.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

BOARD APPROVED: