



**Amistad Community Health Center  
MEDICAL REFERRAL SPECIALIST**

<b>TITLE:</b>	Medical Referral Specialist	<b>DEPARTMENT:</b>	Clinic
<b>SUPERVISOR:</b>	Practice Manager	<b>FLSA STATUS:</b>	NON-Exempt

**JOB SUMMARY:**

This position supports clinic operations by direct involvement with the physician(s) and nurse(s) of a respective department. Daily duties include scanning and electronically attaching medical forms and records, faxing and mailing of medical forms and records, obtaining referrals and authorizations, answering phones, scheduling patient appointments, and other duties as assigned.

**DUTIES AND RESPONSIBILITIES:**

**Medical Records and Forms:**

1. Collect all medical records and forms from each provider's office
2. Scan all medical records and forms
3. Scan all Forms/PDF documents into the "S" drive
4. Attach all PDF documents to patient charts via EHR system
5. Fax and Mail requested medical records and forms according to HIPPA regulations
6. Document actions in patient's chart

**Authorizations/Referrals**

1. Obtain authorizations for patient visits as needed
2. Initiate contact via: phone, mail, fax medical to specialist offices for referrals
3. Provide relevant medical information to specialist and obtain appointment date and time for patient
4. Contact patient with appointment information and instructions
5. Document actions in patient's chart

**EDUCATION and/or EXPERIENCE:**

1. High school diploma or general education degree (GED) and one year related experience and/or training. College degree desired.

**KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:**

- Knowledge of medical terminology gained through experience or formal course work
- Excellent customer service, interpersonal, and oral and written communication skills.
- Basic arithmetic skills (addition, subtraction, multiplication, division, percentage)
- Strong computer skills, working knowledge of (e.g., Microsoft Word, Microsoft Excel, e-mail software).
- Must have good organizational skill to perform multiple activities.
- Ability to be very flexible in accepting department assignments
- Relies on experiences and judgment to plan and accomplish goals to perform a variety of tasks.
- Skill and ability to function effectively and calmly in an unpredictable or stressful environment.
- Ability to work easily and in a friendly manner with the general public.

**LANGUAGE SKILLS:**

Ability to speak, read and comprehend English and Spanish language (not required), simple instructions, short correspondence, memos, and maps. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization. Ability to work with diverse populations. Ability to work under pressure, exercise sound judgement, work with minimal supervision and demonstrate initiative.

**REASONING ABILITY:**

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

**OTHER SKILLS and ABILITIES:**

Knowledge and experience in clerical duties is preferred. Must be computer literate and posses knowledge of word processing in Window/Word; Excel; good written and oral communication skills are necessary.

**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 regularly required to talk or hear. The employee frequently is required to walk and sit. The employee is occasionally required to stand and reach with hands and arms.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

**WORK ENVIRONMENT:**

The employee works primarily indoors in a standard office 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. The noise level in the work environment is usually moderate.

*The above information is intended to describe the most important aspects of the job. It is not intended to be construed as an exhaustive list of all responsibilities, duties and skills required in order to perform the work. The health center reserves the right to revise or change job duties and responsibilities as the business need arises. Additionally, this job description is not intended as an employment contract, implied or otherwise, and the Center continues to maintain its status as an at-will employer.*

*If the essential functions of this position cannot be performed in a satisfactory manner by the employee, reasonable accommodations may be made.*

***I hereby acknowledge that I have read and understand the above mentioned job duties, qualifications, policies, and procedures for this position. I also certify that I received a copy of this job description.***

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

Amistad Clinic  
Core Competency for Referral/Medical Record Specialist

Name \_\_\_\_\_ Date \_\_\_\_\_

The above named staff member must be able to demonstrate the knowledge and skill necessary to provide care based on physical, psychosocial, educational, safety and related criteria appropriate to the age of the patients served in their assigned area. Validation to be completed by a co-worker with minimum of equivalent licensure, physician and/or manager/supervisor. Person validating must initial, date and indicate method of validation in appropriate column and sign form.

Methods of Validation:

Examination/Test (E)                      Demonstration (D)                      Rating Scale  
 Observation (O)                              Medical Records (MR)                      Competency Pending (CP)  
 Verbal Response (V)                      Feedback (F)                              Not Applicable (N/A)

Competency Statement	Compliance Criteria	Validation Method	Validated by	Date
<b>Indicates awareness of staffing, scheduling process, and Scopes of Practice</b>	<ul style="list-style-type: none"> <li>• Proper use of PTO</li> <li>• Sick call process</li> <li>• Understand Scope of Practice for the position</li> </ul>			
<b>Verifies knowledge and appropriate use of Computer System(s)</b>	<ul style="list-style-type: none"> <li>• Completes EHR training</li> <li>• Accesses information independently via the computer</li> </ul>			
<b>Referral Specialist</b>	<ul style="list-style-type: none"> <li>• Completes and documents patient referral process to the appropriate specialist</li> <li>• Provides pertinent information/records to the consulting physician with the required patient permission</li> <li>• Maintains referrals from all Amistad providers at a manageable level</li> <li>• Assists patients with referrals to their satisfaction</li> <li>• Follows up on patient missed appointments and reschedules with specialist</li> <li>• Develops and maintains valuable relationships with specialists staff</li> </ul>			
<b>Medical Record Specialist</b>	<ul style="list-style-type: none"> <li>• Ensures Release of Medical Information has been approved by patient</li> <li>• Processes incoming and outgoing medical record requests within 10 days of receipt and alerts front desk staff of any monetary charges to be assessed</li> <li>• Follows HIPPA regulations for all PHI exchange</li> <li>• Scans/attaches pertinent information to appropriate patient chart</li> <li>• Assists with chart audits as needed</li> <li>•</li> </ul>			
<b>Misc.</b>	<ul style="list-style-type: none"> <li>• Ordering Supplies</li> <li>• Calling a Code</li> <li>• Compliant with all Safety Policies</li> <li>• Maintain clean, uncluttered work space</li> <li>• Complies with QA/QI (OC3) processes</li> </ul>			