

## 4. Referral Coordinator Job Description

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## Referral Coordinator Job Description

We have reviewed many job descriptions for positions labeled “care coordinators,” “referral coordinators,” or “referral managers” and the like. Some position descriptions seek nurses and combine clinical with referral management functions. Some positions are strictly clerical dealing exclusively with information transfer and insurance authorization. What follows is a summary of the responsibilities found in these job descriptions that seem to fall under the referral coordinator role.

Referral and transition coordination includes the following activities:

- Maintain ongoing tracking and appropriate documentation on referrals to promote team awareness and ensure patient safety. This tracking may use an IT database.
- Ensure complete and accurate registration, including patient demographic and current insurance information.
- Assemble information concerning patient's clinical background and referral needs. Per referral guidelines, provide appropriate clinical information to specialist.
- Contact review organizations and insurance companies to ensure prior approval requirements are met. Present necessary medical information such as history, diagnosis and prognosis. Provide specific medical information to financial services to maximize reimbursement to the hospital and physicians.
- Review details and expectations about the referral with patients.
- Assist patients in problem solving potential issues related to the health care system, financial or social barriers (e.g., request interpreters as appropriate, transportation services or prescription assistance).
- 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.
- Identify and utilize cultural and community resources. Establish and maintain relationships with identified service providers.
- Ensure that referrals are addressed in a timely manner.
- Remind patients of scheduled appointments via mail or phone.

- Ensure that patient's primary care chart is up to date with information on specialist consults, hospitalizations, ER visits and community organization related to their health.

If you are hiring someone into a referral coordinator role, the following experience and skills may be important:

- High school diploma, sometimes combined with medical assistant certification
- 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