**Primary Accountability**

Assists Providers in scheduling patients to referring Providers outside of the clinic

**Primary Duties & Responsibilities**

1. Schedules appointment and communicates information to the patient

a. Check Electronic Medical records (EMR) for referral order

b. Determine where to refer the patient if the Provider has not indicated a specific Provider

c. Confirm with patient their preference for time, date and location

d. Check Centricity (CTI) and confirm patient’s demographic information and insurance

e. Contact Specialist and make the appointment

f. Communicate information including directions to site, and any information required for appointment to patient

g. Fax all pertinent chart information to the Specialist

h. Researches the internet for Specialist information

2. Follows pre authorization process

a. Determines if pre authorization is required using Qualis, JIVA, and American Imaging Management (AIM) and/or via phone, etc

b. Completes appropriate request information providing any additional information required

c. Provides explanation of the process and expected notification time to the patient

3. Approved authorization

a. Notifies patient of appointment time, date and additional information by phone and mail

b. Contacts the specialist to schedule appointment after obtaining pre authorization

c. Faxes all chart information required to the Specialist as appropriate

4. Denied pre authorizations

a. Notify the Provider

b. Review the denial and provide any supporting documentation that may be required for approval

c. Notify the patient and refer them back to their clinic Provider for further instruction

5. Checks insurance status on all pending referrals monthly for the following month using appropriate websites

a. Notifies patient if insurance status has changed

b. Contacts Specialist to determine what is required of patient for payment at visit and advise patient

c. Refer patient to Benefit eligibility specialist as appropriate

d. Notifies Provider if appointment is cancelled or patient did not show up for appointment

6. Completes the Referral Process

a. Contacts the Specialist if appointment chart notes and documentation is not received

b. Forwards the referral information to HIM for scanning to patient chart and completes referral in EMR

c. Follows up with patients who do not keep specialty and imaging appointments

7. Communicates quality of care issues to Supervisor and participates in the Plan-Do-Study-Act cycles to improve performance on targeted metrics

8. Performs clerical duties

a. Prints and distributes incoming faxes

b. Collects and distributes the mail

c. Answers and directs incoming calls

d. Checks voice mail frequently

9. a. Ensures attendance and hours worked are accurately recorded in Kronos

b. Properly manages paid time off (PTO)

c. Responsible for regular and punctual attendance

**General Development**

1. Requires basic organizational skills, typically to organize own work
2. Job duties require the ability to work independently and as part of a team
3. Job duties are typically performed in response to workflow or ongoing direction by supervisors or others
4. Employees are able to effectively select from alternatives to situations encountered on the job
5. Employees focus is primarily on their own work
6. Duties require the compilation of information

**Professional & Technical Knowledge**

Possesses a basic level of written and verbal communications skills, computational and computer skills and mathematical knowledge typically acquired through completion of a high school program

**Technical Skills**

1. Ability to prepare basic correspondence and simple reports in Microsoft Word
2. Ability to create, send and manage email in Outlook
3. Ability to access and complete data entry in Centricity (CTI)
4. Ability to access web based applications including but not limited to AIM,QALIS,JIVA and HIP Provider One and other insurance sites as needed

**Communication Skills**

1. Job duties require the employee to effectively communicate basic or non-technical information to co-workers and others
2. Employees are expected to exercise tact and diplomacy in the resolution of mild conflicts or disagreements
3. Job duties require the effective communication of information in written (including electronic) correspondence
4. Job duties require the effective communication of information in informal and formal settings

**Work Environment**

Work is performed in an office environment