



PT REFERRAL COORDINATOR

LOCATION/DEPARTMENT: Physical Therapy **DATE DEVELOPED:** 9/27/2012

DATE OF THIS REVISION: 3/15/2019

REPORTS TO: Scheduling Supervisor

SUPERVISORY RESPONSIBILITIES: **STATUS:** Non-exempt
No supervisory responsibilities.

General Summary of Duties: With a customer service orientation, schedule patient outgoing referrals, authorize and schedule patients appropriately by performing the following duties:

Essential duties and responsibilities: Responsibilities include but are not limited to, the following:

- Maintains patient confidentiality by following company and HIPAA guidelines.
- Interacts with patients in a prompt, pleasant and helpful manner using a multi-line telephone system.
- Maintains and updates current patient information in our electronic medical records system.
- Provides coverage for coworkers as directed by the supervisor or designee; referrals for Physical Therapy
- Scans and files documents into patient charts or in appropriate place.
- Directs all outgoing patient referrals ordered by designated providers.
- Authorizes outgoing referrals as required by insurance to ensure continuity of care.
- Documents appropriately for all referrals to ensure tracking of patient care.
- Tracks all referrals to ensure that the patients come back for follow up as indicated by referring provider; calls the patient as needed for follow up appointments.
- Ensures all notes, reports from referrals are received and filed appropriately in the chart.
- Confirms the referral is entered into ExScribe and has been tasked to the appropriate staff
- Communicates with appropriate Medical Assistant if patient refuses treatment so physician may be notified.
- Performs all other tasks and projects as assigned

Competencies:

To perform the job successfully, an individual should demonstrate the following competencies:

- Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.
- Project Management - Develops project plans; Coordinates projects; Communicates changes and progress; Completes projects on time and budget; Manages project team activities.
- Technical Skills - Assesses own strengths and weaknesses; Shares expertise with others.



- Customer Service - Manages difficult or emotional customer situations; Responds promptly to customer needs; Responds to requests for service and assistance; Meets commitments.
- Interpersonal Skills - Focuses on solving conflict; Listens to others without interrupting; Remains open to others' ideas and tries new things.
- Oral Communication - Speaks clearly and persuasively in positive or negative situations; Responds well to questions; Participates in meetings.
- Written Communication - Writes clearly and informatively; Able to read and interpret written information.
- Teamwork - Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.
- Change Management - Communicates changes effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results.
- Leadership - Exhibits confidence in self and others; Accepts feedback from others; Gives appropriate recognition to others.
- Quality Management - Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness.
- Business Acumen - Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals.
- Cost Consciousness - Works within approved budget; Develops and implements cost saving measures; Contributes to profits and revenue.
- Diversity - Shows respect and sensitivity for cultural differences; Promotes a harassment-free environment.
- Ethics - Treats people with respect; Keeps commitments; Works with integrity and ethically.
- Organizational Support - Follows policies and procedures.
- Strategic Thinking - Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions.
- Judgment - Includes appropriate people in decision-making process; Makes timely decisions.
- Motivation - Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles.
- Planning/Organizing - Prioritizes and plans work activities; Uses time efficiently; Plans for additional resources.
- Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.
- Quality - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.
- Safety and Security - Observes safety and security procedures; Reports potentially unsafe conditions.
- Adaptability - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.



- Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.
- Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan.
- Initiative - Volunteers readily; Asks for and offers help when needed.

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions

Education and Experience:

High School Diploma; One year certificate from college or technical school; or three to six months related experience and/or training; or equivalent combination of education and experience.

Language Skills:

Ability to read and comprehend simple instructions, short correspondence, and memos. 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.

Mathematical Skills:

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.

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.

Computer Skills:

To perform this job successfully, an individual should have knowledge of Internet software; Spreadsheet software and Word Processing software.

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.

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



The employee will occasionally lift or move up to 10 pounds.

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

Environmental & Working Conditions:

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. Work is performed in a well lit, fast-paced reception area and involves frequent contact with patients and physicians.

Employee Signature: _____ Date: _____

Employee Name (Printed): _____