

UW HEALTH JOB DESCRIPTION

Coordinated Care Resource Specialist - Referral

Job Code: 300123	FLSA Status: Non-Exempt	Mgt. Approval: B. Liegel	Date: June 2019
Department: Coordinated Care		HR Approval: J. Tokarski	Date: June 2019

JOB SUMMARY

The Referral Specialist is part of the Coordinated Care Resource Center workgroup and is responsible for coordinating the patient's referrals to ancillary providers, transport companies, community agencies, post-acute care facilities, and to assist clinical case management staff in completing discharge planning tasks as directed. The Referral Specialist carries out all responsibilities in accordance with the UW Health's and the Coordinated Care Department's core values, applicable policies and procedures, and civil laws. This position provides backup to the Coordinated Care Payer Specialist.

MAJOR RESPONSIBILITIES

1. Maintains an awareness and understanding of referral resources and initial referral posting processes within Allscripts Extended Care Information Network (ECIN).
2. Establishes liaison relationships with ancillary providers, community agencies, and post-acute care facilities for maintaining a current Allscripts ECIN database of providers.
3. Uses Health Link in Basket functionality as delegated by the Outcomes Manager, Case Manager, or Social Worker to identify patients that require a task or referral completed.
4. Identifies and assures completion of on-line documentation requirements prior to sending the initial referral via Allscripts ECIN. Uses the Allscripts ECIN search function to identify and post the referral to the appropriate ancillary provider or post-acute care facility as per patient choice. Uses Allscripts ECIN to identify facilities available to the patient based on patient needs, level of care, payer, and bed availability.
5. Discusses options with payers and providers regarding placement based on patient's needs and resources available to meet those needs. Communicates all necessary information to Clinical Case Management Team and Payer Specialist regarding placement and transportation as needed.
6. Arranges for patient transfer to occur within appropriate timeframe. Optimizes placement of patients in the most appropriate setting; aligning needs of patients with placement options and patient choice that is consistent with their insurance coverage plan.
7. Supports other members of the Coordinated Care Resource Center.
8. Shares patient specific insurance or referral issues with the Coordinated Care Resource Center leader, the Coordinated Care director and manager staff, Case Management staff, and to other pertinent areas at UW Health.
9. When required, obtains and documents referral from the patient's payer for post-admission clinic visits.
10. Other duties as assigned.

ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.

JOB REQUIREMENTS

Education	Minimum	Associate degree in health care or social service related discipline. Relevant experience will be considered in lieu of the degree.
	Preferred	Bachelor's degree in health care or social service related discipline.
Work Experience	Minimum	One (1) year experience in a health care or social service setting.
	Preferred	
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> Knowledge of medical terminology, diagnostic procedures/tests. Beginning knowledge of health care agencies and community resources. Beginning knowledge of funding for health care services and financial resources available to patients. Beginning knowledge of the utilization review function. Excellent interpersonal communication, problem-solving, and conflict resolution skills. Computer skills in word processing, database management, and spreadsheets preferred.

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	<ul style="list-style-type: none"> • Demonstrated professional behavior and relationships with ability to maintain confidentiality within the work setting. • Demonstrates critical thinking and problem-solving skills. • Ability to understand and apply concepts related to patient placement issues. • Ability to negotiate effectively. • Ability to prioritize assignments and complete in a timely manner. • Ability to maintain competency as both Referral and Payer Specialist
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AGE SPECIFIC COMPETENCY (Clinical jobs only)

Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.

Instructions: Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below. Next,

	Infants (Birth – 11 months)		Adolescent (13 – 19 years)
	Toddlers (1 – 3 years)		Young Adult (20 – 40 years)
	Preschool (4 – 5 years)		Middle Adult (41 – 65 years)
	School Age (6 – 12 years)		Older Adult (Over 65 years)

JOB FUNCTIONS

Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.

PHYSICAL REQUIREMENTS

Indicate the appropriate physical requirements of this job in the course of a shift. *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

Physical Demand Level	Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
x Sedentary: Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as docket, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.	Up to 10#	Negligible	Negligible
Light: Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree.	Up to 20#	Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	Negligible or constant push/pull of items of negligible weight
Medium: Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	20-50#	10-25#	Negligible-10#
Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	50-100#	25-50#	10-20#
Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	Over 100#	Over 50#	Over 20#
Other - list any other physical requirements or bona fide occupational qualifications not indicated above:			

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.