



3900 WEST BROWN DEER ROAD, SUITE 200
BROWN DEER, WI 53209
PHONE: 414.540.2170 • FAX: 414.540.2171
WWW.SHOREHAVENBHI.COM

JOB DESCRIPTION
Referral Coordinator
Revised 11/13/2024

1. Title of Position and Supervisor

Title: Referral Coordinator

Department Supervisor: Head Referral Coordinator

Reports to: Executive Director

Job Location: 3900 W. Brown Deer Rd

Employment Type: W-2 Employee, Full or Part Time, Daytime Hours, Hourly

Salary/Benefit Notes: Earnings will be hourly, commensurate with past mental health or customer service experience

2. Job Summary

By forming a compassionate, empathic connection with callers requesting to be clients and gathering essential information, the Referral Coordinator will facilitate the growth and effectiveness of Shorehaven's clinical services. The Referral Coordinator maintains an ever-improving process for the handling of referrals and providing the highest standard of customer service. Your responsibility is to set up complete and accurate case information from the initial call(s) by the referral source or client, collecting information of the referral sources, collecting insurance information, eliciting prior authorizations, securing appropriate clinicians for case assignments, and monitoring clinician schedules and caseloads.

In addition, we all maintain complete confidentiality of client information, client records, business records, and company information and procedures.

3. Position qualifications

The Referral Coordinator has a Bachelor's degree or significant work experience in the mental health field. The referral coordinator must have initiative, strong work ethic, good communication skills for screening and setting up of referrals, including empathy, writing skills, exceptional follow through, organization, equanimity and the creativity to see new ways to improve the new client process. The Referral Coordinator must have skills in Microsoft Office as well as creating basic Excel spreadsheets or the ability to learn computer software quickly. Experience working with a culturally diverse population is crucial. The position requires flexibility in terms of working hours for attending marketing events, although that is infrequent. The referral coordinator needs the ability, professional demeanor and positive attitude to represent Shorehaven Behavioral Health in the community as well as in the office.

4. Major duties and responsibilities

Work effectively and collegially with the In-Home and Outpatient, CSS, Billing and Credentialing staff.

Maintain clinician availability reports

Facilitate high level of client completion of initial appointments, that is, the percentage of first time callers who come to the first appointment

Track start up time on new cases and transitioned cases.

Referral Management:

Receive referral information via phone, fax, and/or email

Basic triage of callers for Emergent, Urgent, and Routine appointment needs

Engage callers empathically, gathering essential information, and recording it in our Electronic Health Record

Record referral information accurately and completely

Communicate with clinicians regarding new cases

Send new client information packets and client surveys

Request medical records when needed for referral process

Refer persons who cannot be served by Shorehaven to alternative sources

Liaison between referral resources and clinical staff

Maintain statistics on clinician productivity

Maintain database of the disposition of new referrals

Assist with Referral Development

Help develop new client materials with direction of manager and/or director.

Attend networking/marketing events

Stay current with community resources and services

Assist in other administrative tasks as needed

Attend appropriate meetings as requested

Anticipate and report possible areas of concern regarding referrals, staff, or systems

Become proficient in and safeguard Procentive, our web based management and tracking program

Use and safeguard the Medicaid Portal

Assist manager and/or Director with training materials and set up of training meetings when needed.

Assist with other tasks needed for department projects, audits etc.

Maintain a positive attitude in the office at all times

5. Accountability and Benchmarks

Outstanding telephone manner observed by staff

Gather reasonably complete information

85% of callers you process come to first appointments

Clinicians receive the information you gather in a way that helps them prepare to help the client

optimally

All caller information is entered into the system and is complete

Positive relationship with all callers and staff

You are hired not merely to perform a job function, but because we believe your skills will make those job functions an effective, integral and important part of growth of your department and SBH and contribute to the welfare of your colleagues, our clients and the community.

You will be making a contribution to the profitability from which you and your team members will benefit.

Every duty and expectation is your contribution to the welfare of the entire team, the company, yourself and the welfare of our clients.

Customers for Your Job Function

Clients- To enhance the well-being, health, quality of life, and lifestyle functioning of clients by assisting them to receive the help they may need.

Referral Sources- To think of SBH as the premier, “go-to” provider to make their work easier because they know they can rely upon Shorehaven and you are a “go-to” person.

Clinicians- To maximize the clinical staff’s time by streamlining the referral process to help staff serve new clients readily.

Team Members- To work together as a team to connect with and process every referral eagerly and rapidly.

Company- To maximize productivity, billable client hours and referral development. To maintain and contribute to the public perception that we provide the gold standard of psychotherapy services and customer service.

Yourself- To work with us on your career development and your job-satisfaction to make this your long-term job career.