



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

JOB DESCRIPTION: In-Home Referral Coordinator

1. Title of Position and Supervisor

Title: In-Home Referral Coordinator
Department Supervisor: Carol Trout- Director of In-Home Services
Report directly to: Wendy Diehls, LCSW – Manager of In-Home Services

2. Assigned organizational unit: Business Operations Team, In Home Department
Specified Role: Intake Team

3. Job Summary or overview, including job classification

The In-Home Referral Coordinator will facilitate the growth and effectiveness of the In-Home Department at Shorehaven. This will be achieved by developing and maintaining a process for the handling of in home referrals and providing the highest standard of customer service. This position also requires cross training and the ability to help provide coverage for outpatient referral department. Your optimal responsibility is to set up complete and accurate referrals from initial call by the referral source or client, collecting insurance information, eliciting prior authorizations to securing appropriate clinicians for case assignments and monitoring caseloads.

4. 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 a plus. The position requires flexibility in terms of working hours for attending marketing events several times per year. 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.

5. Major duties and responsibilities

Support the goals and requests of the Department Director.
Follow up on directives and requests of the Department Manger quickly and professionally.
Work effectively and collegially with the In-Home and Outpatient, CSS, Billing and Credentialing staff.
Maintain In-Home Staff Availability
Facilitate high level of client completion of initial appointments
Track start up time on new cases and transitioned cases.
In-Home Referral Management:
Receive referral information via phone, fax, and/or email.
Liaison between referral resources and clinical staff
Basic triage of callers for Emergent, Urgent, and Routine appointment needs
Record referral information accurately and completely
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
Collaborate well with Outpatient referral staff for optimal flow from In Home to Outpatient
Collaborate with credentialing 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 to In Home Director
Become proficient in Procentive, our web based management and tracking program
Become a resource to therapists on Procentive and the Medicaid Portal
Assist manager and/or Director with training materials and set up of training meetings when needed.
Set up meetings for Director and/or Manager when needed.
Assist with other tasks needed for department projects, audits etc.
Maintain a positive attitude in the office at all times

6. Accountability and Benchmarks

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 you 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 “go-to” person.

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

Supervisor- To contribute to the department team, to appreciate the wisdom and experience of your supervisors.

Team Members- To work together establish the set ideals and to develop modern ideas to further develop SBH.

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.