

**AGC PEDIATRICS  
204 PROFESSIONAL COURT  
CALHOUN, GA 30701**

**STANDARD OF PERFORMANCE**

<b>JOB TITLE: Referral Coordinator</b>	<b>EMPLOYEE:</b>	<b>DATE OF EVAL:</b>
<b>REPORTS TO:</b>	<b>DATE OF HIRE:</b>	<b>OFFICE: CALHOUN CARTERSVILLE</b>
<b>NEW HIRE TRAINING</b>	<b>90 DAY EVALUATION</b>	<b>ANNUAL EVALUATION</b>

Training/Evaluation Due Date: \_\_\_\_\_

Training/Evaluation Completion Date: \_\_\_\_\_

\_\_\_\_\_  
Employee's Signature Date

\_\_\_\_\_  
Evaluator's Signature Date

<b>Rating Score: E = Exceeds Standards M = Meets Standard NI = Needs Improvement</b>			Evaluator Rating Score	Self Evaluation Rating
<b>AREAS OF PERFORMANCE</b>	<b>EVIDENCE/RESPONSIBILITIES OF STANDARD COMPLIANCE</b>	<b>EVALUATION TOOLS USED</b>		
<b>ASSESSMENT</b>	Promptly gathers patient data and identifies physical and cultural needs of individual cases Identifies urgent referral requests, addresses promptly Understands instances which require prior authorization	Observation Record Review		
<b>CREATING AND CONFIRMING APPOINTMENTS</b>	Obtains up-to-date contact information for specialists Associates diagnoses with proper specialties Confirms specialist practice policy regarding patient insurance Determines patient preference for location of specialist Communicates needs of patient clearly and politely to specialist staff Obtains all information needed for the patient prior to appointment Communicates needs of specialist clearly and politely to patient, addresses any questions or concerns from parent Delivers all necessary information to parent including specialist phone number, any instruction from specialist, and appointment information Empowers parent to take control of appointment process	Observation Record Review		
<b>COMMUNICATING WITH STATE AND PRIVATE INSURANCE</b>	Understands all web-enabled insurance sites thoroughly Able to obtain insurance information, confirm eligibility, and obtain prior authorization for necessary services Knows which procedures require prior authorizations for which insurances Communicates effectively with insurance companies and specialists regarding prior authorization	Observation Record Review		
<b>TECHNICAL KNOWLEDGE IN ECLINICALS</b>	Navigates patient demographics, telephone encounters, and referral orders proficiently Able to send and receive faxes electronically Records all actions taken on referrals in a way that others can understand and reproduced Understands circumstances which allow for addressing referrals and when they should be left open Locates and files records in appropriate areas of patient documents	Observation Record Review		

<b>Rating Score: E = Exceeds Standards</b> <b>M = Meets Standard</b> <b>NI = Needs Improvement</b>			<b>Evaluator</b> <b>Rating Score</b>	<b>Self</b> <b>Evaluation</b> <b>Rating</b>
<b>AREAS OF</b> <b>PERFORMANCE</b>	<b>EVIDENCE/RESPONSIBILITIES OF</b> <b>STANDARD COMPLIANCE</b>	<b>EVALUATION</b> <b>TOOLS USED</b>		
<b>EDUCATION</b>	Participates in continuing education programs and completes all mandatory programs annually Completes departmental clinic competency evaluations including annual competency testing	Education Review		
<b>PROFESSIONALISM</b>	Demonstrates agreement and behaviors consistent with the clinic's philosophy, mission, goals, policy, and procedures Demonstrates behaviors that promote positive customer relations with physician, staff, patients, and visitors Follows Patients' Rights Policies at all times Comes to work as scheduled and consistently demonstrates dependability and punctuality Always guards patient privacy according to HIPAA regulations	Observation Record Review		

1. **ASSESSMENT:** Include areas identified as needing improvement as well as areas that exceed expectations

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2. **CREATING AND CONFIRMING APPOINTMENTS:** Include areas identified as needing improvement as well as areas that exceed expectations

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3. **COMMUNICATING WITH STATE AND PRIVATE INSURANCE:** Include areas identified as needing improvement as well as areas that exceed expectations

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4. **TECHNICAL KNOWLEDGE IN ECLINICALS:** Include areas identified as needing improvement as well as areas that exceed expectations

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5. **EDUCATION:** Include areas identified as needing improvement as well as areas that exceed expectations

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6. **PROFESSIONALISM:** Include areas identified as needing improvement as well as areas that exceed expectations

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**Educational plan for areas needing improvement:**

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