

PATIENT REFERRAL SPECIALIST

JOB DESCRIPTION

(Effective December 22, 2008)

Patient Referral Specialists perform a wide variety of tasks associated with clinical study activities which are integral to the successful conduct of clinical research studies. Patient Referral Specialists are responsible for learning and reviewing inclusion/exclusion criteria concerning all new interested patients. Patient Referral Specialists also track all referrals from internal and external referring physicians and are frequently the first staff members to meet new, potential patients for research studies.

Reports to: Clinical Research Director and Study Investigators

Classification: Non-exempt position

QUALIFICATIONS/JOB REQUIREMENTS:

- Successful completion of a formal medical/clinical educational program and possession of a current, unrestricted license or certification (*i.e.*, R.N., L.P.N., C.M.A., E.M.T., R.T.), or in the alternative, must have a strong desire to learn medical terminology and a demonstrated ability to learn quickly.
- Ability to interpret and perform, if needed, clinical, laboratory and diagnostic tests or demonstrated ability to learn.
- Ability to quickly adapt to working in a wide variety of dynamic therapeutic areas of medicine.
- Demonstrated ability to exercise standard Universal Precautions; in the alternative, the ability to quickly learn and apply Universal Precautions.
- Demonstrated ability to operate basic office equipment including (but not limited to) copying machines, facsimile machines, multi-line telephones and personal computers.
- Ability to effectively devote keen and acute attention to detail.
- Ability to multi-task and perform multiple critical tasks simultaneously (under dynamic and ever-changing circumstances).
- Strong desire and demonstrated ability to work with persons seeking professional health care.
- Strong written communication skills, including exceptional spelling abilities.
- Strong verbal communication skills.
- Strong interpersonal skills.

- Highly motivated “self-starter” with the ability to exercise initiative, together with ability to work as a team player as well as independently while managing a variety of study related projects simultaneously.
- Basic knowledge of computer operations and demonstrated computer skills in a variety of software environments (*i.e.*, Word, Excel, Internet).
- Basic knowledge of medications and their therapeutic uses, general medical diagnosis and medical terminology.

RESPONSIBILITIES:

Patient Referral Specialists shall:

- Become familiar with all federal *Food and Drug Administration* (FDA) regulations and guidelines applicable to clinical research studies. Such familiarity will help ensure that studies are conducted in accordance with federal law. This responsibility requires close and careful study of relevant legal provisions and keeping abreast of changes in applicable laws. Additionally, this responsibility requires Patient Referral Specialists to apply this knowledge on a daily basis to help minimize the risk of regulatory noncompliance.
- Assist in all assigned phases of conducting clinical research studies in compliance with FDA regulations and guidelines. This responsibility requires familiarity with relevant legal provisions and keeping abreast of changes in applicable laws. Additionally, this responsibility requires Patient Referral Specialists to apply this knowledge on a regular basis to minimize the risk of regulatory noncompliance.
- Study, learn and comply with Family Medicine East employee handbook, standard operating procedures, and other policies, practices and regulations where applicable.
- Design and maintain organizational tools to ensure proper recruitment for research studies; this task shall be performed accurately and in compliance with Good Clinical Practice Guidelines.
- Answer, when necessary, all telephone calls and inquiries relating to advertising and triaging.
- Accurately maintain complete logs of all advertising-related telephone calls and inquiries.
- Interview, utilizing protocol inclusion/exclusion screening process criteria, all potential patients in person or by telephone. Successful satisfaction of this responsibility requires Patient Referral Specialists to learn and maintain familiarity with the inclusion/exclusion screening processes specific to each study.

- Review, regularly and on an “as needed” basis, all potential patient medical charts, utilizing the appropriate database for completion of this task.
- At all times ensure the safety and welfare of study participants.
- Learn and maintain a keen awareness of each pharmaceutical company sponsor’s specific goals, requirements, protocols and procedures to ensure that study activities are correctly completed.
- Assist physicians and study investigators comprehend, understand and implement each protocol.
- Actively recruit and screen potential study participants in accordance with each protocol inclusion/exclusion criteria. Successful satisfaction of this responsibility requires Patient Referral Specialists to learn and maintain familiarity with each protocol inclusion/exclusion criteria.
- On an “as needed” basis, assist Clinical Research Coordinators in administering the Informed Consent.
- Travel to and perform duties of the position at other Heartland Research Associates, LLC locations when assigned or directed to do so.
- Regularly and closely communicate with Clinical Research Coordinators during each study to assess scheduling and study support needs and requirements.
- Accurately and in a timely manner schedule study participants’ first visits.
- Utilizing *Clinical Conductor*, enter patient information and data accurately and in a timely manner.
- Organize and conduct monthly screening clinics (*i.e.*, blood pressure, heel scans, blood draws, etc.).
- On a weekly basis, review referrals and randomization totals.
- Learn, apply and utilize computer software applications to enhance workflow and study activity efficiency.
- Utilizing *Clinical Conductor*, collect and summarize monthly randomization numbers and forward the reports to the Research Director and Clinical Research Assistants.
- Participate in community research events, including local health fairs and other health-related events. Successful satisfaction of this responsibility requires Patient Referral Specialists to maintain familiarity with events, schedules and the medical community as a whole.
- Attend study initiation meetings for all assigned studies.
- Attend clinical research meetings, and professional meetings on a national and international basis, as needed.
- Write advertising and submit to IRB for approval.

- Create and utilize recruitment plan for each study.
- Maintain physician's and Director's study summary binders. Update on a weekly basis.
- Keep nursing staff and front desk staff abreast of current studies. Maintain and update quick reference cards monthly.
- Maintain and update monthly patient referral binders located in each exam room.

WORKING CONDITIONS:

- Medical office environment, specializing in family practice. Direct contact with patients, staff and physicians. Exposure to communicable diseases and body fluids, hazardous substances and other conditions common to clinic environment. Exposure to emergency situations.

ACKNOWLEDGMENT

I acknowledge receiving and reading this Job Description, and having the opportunity to ask questions about it and having those questions answered.

“Employee”

“Witness”