

## UW HEALTH JOB DESCRIPTION

### Clinical Research Unit Assistant

<b>Job Code:</b> 310053	<b>FLSA Status:</b> Non-Exempt	<b>Mgt. Approval:</b> T. Kiger	<b>Date:</b> March 2023
<b>Department:</b> Clinical Research		<b>HR Approval:</b> K. Fleming	<b>Date:</b> March 2023

#### JOB SUMMARY

The UW Health Clinical Research Unit Assistant collaborates with both clinical and research teams across UW Health and UW Madison to coordinate all aspects of patient/participant visits on the Clinical Research Unit (CRU). This position is often the first contact for patient/participants when they visit University Hospital for a clinical research study. They are responsible for greeting patient/participants upon arrival, updating their personal information in the electronic health record, and checking patient/participants in and out.

The UW Health Clinical Research Unit Assistant is responsible for advanced level scheduling of patient/participants, including coordination of multiple complex appointments with the CRU Care Team Leader. The CRU supports a mix of outpatient visits and overnight stays, so in addition to patient/participant check-in, the UW Health Clinical Research Unit Assistant is also responsible for admission, transfer, and discharge for overnight stays, communication with patients, visitors and staff, electronic health records maintenance, entering/verifying appropriate overnight and outpatient visit charges, and other duties of a clerical nature. This position is also responsible for setting up complex paper charts specific to the individual research study, visit (cycle/day), cohort and arm, and coordinating these set-ups with the CRU Lab Specialist.

A prime importance to this position is the ability to maintain control under stressful conditions and periods of high unit activity, while utilizing effective and respectful communication with patients, visitors, clinical research personnel, CRU staff, and the health care team.

#### MAJOR RESPONSIBILITIES

- Coordinate and prioritize tasks, maintaining daily flow of the unit in a complex, rapidly changing environment.
- Provide excellent customer service to patients, family members, and study personnel:
  - Communicate in a manner consistent with positive patient relations.
  - Demonstrate a welcome environment by smiling and making eye contact when greeting all patients, family members, and study personnel.
  - Provide helpful assistance in anticipating and responding to the needs of all patients and family members.
  - Collaborate with customers in planning and decision making to result in optimal solutions.
  - Remain calm under pressure and effectively deal with difficult people.
  - Independently recognize, interpret, and evaluate situations and their level of urgency.
- Effectively coordinate communications involving incoming/outbound calls, pages and nurse call light system.
- Coordinate patient/participant scheduling of complex appointments with the CRU Care Team Leader, taking into consideration study acuity, staffing coverage, unique room/resource availability, and timing of return visits.
  - Schedule appointments via phone, in person, or via electronic/fax correspondence.
  - Cancel and reschedule appointments, coordinating with the Admissions Dept. as appropriate.
- Set-up complex paper charts specific to the individual research study, visit (cycle/day), cohort and arm, and coordinate these set-ups with the CRU Lab Specialist.
- Perform Health Link check-in for all outpatients and overnight stays.
  - Coordinate admissions, discharges and transfers of overnight patients.
  - Call down outpatient menus to the diet office.
- Create and maintain patient records:
  - Verify and update patient demographics.
  - Complete Medicare as a Secondary Payor Questionnaire as needed.
  - Facilitate completion of Assignment of Benefit and HIPAA forms as required and send forms to Outpatient Registration once complete.
  - Update and verify primary care and referring providers.
  - Enter overnight and outpatient charges for all patient/participants.
- Effectively manage various administrative tasks and other duties as assigned.
- Demonstrate a high level of attention to detail which is critical when dealing with patient care.
- Appropriately process the flow and events occurring within the unit.

## UW HEALTH JOB DESCRIPTION

- Recognize possible issues and act proactively to avoid a negative impact.
- Assist with the orientation and training of other employees (i.e. new staff in same position and cross-training all RNs into this role to support cross-coverage given the unique workflows of the unit).
- Complete other miscellaneous tasks, including but not limited to:
  - Maintain or initiates faxes
  - Maintain desk and/or clinic supplies
  - Sort and distribute mail
  - Contribute to the smooth operation of practice

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

### JOB REQUIREMENTS

Education	Minimum	High school diploma or equivalent.
	Preferred	
Work Experience	Minimum	One (1) year of experience in a medical or customer service environment or experience of a similar nature
	Preferred	One (1) year of experience in a medical environment
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities	<ul style="list-style-type: none"> <li>• Excellent customer service skills</li> <li>• Excellent verbal, listening, and written communication skills</li> <li>• Demonstrate effective and respectful communication with patients, families, clinical research personnel, and the healthcare team, using excellent interpersonal skills</li> <li>• Ability to adapt to a rapidly changing environment</li> <li>• Ability to quickly and appropriately prioritize tasks and manage interruptions</li> <li>• Excellent organizational skills</li> <li>• Ability to think independently and demonstrate good problem-solving skills</li> <li>• Ability to work in a team environment and collaborate with a variety of individuals in a positive manner</li> <li>• Complete work timely and accurately</li> <li>• Demonstrate exemplary telephone etiquette</li> <li>• Possess accurate keyboarding skills</li> <li>• Knowledge of medical terminology preferred</li> <li>• Knowledge of word processing and electronic communication preferred</li> </ul>	

### 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.

<input type="checkbox"/>	Infants (Birth – 11 months)	<input type="checkbox"/>	Adolescent (13 – 19 years)
<input type="checkbox"/>	Toddlers (1 – 3 years)	<input type="checkbox"/>	Young Adult (20 – 40 years)
<input type="checkbox"/>	Preschool (4 – 5 years)	<input type="checkbox"/>	Middle Adult (41 – 65 years)
<input type="checkbox"/>	School Age (6 – 12 years)	<input type="checkbox"/>	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.*

<b>Physical Demand Level</b>	<b>Occasional</b> Up to 33% of the	<b>Frequent</b> 34%-66% of the time	<b>Constant</b> 67%-100% of the time
------------------------------	---------------------------------------	--	---

## UW HEALTH JOB DESCRIPTION

		time		
	<b>Sedentary:</b> 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.	<b>Up to 10#</b>	<b>Negligible</b>	<b>Negligible</b>
<b>X</b>	<b>Light:</b> 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.	<b>Up to 20#</b>	<b>Up to 10#</b> or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	<b>Negligible</b> or constant push/pull of items of negligible weight
	<b>Medium:</b> Ability to lift up to 50 pounds maximum with frequent lifting/and or carrying objects weighing up to 25 pounds.	<b>20-50#</b>	<b>10-25#</b>	<b>Negligible-10#</b>
	<b>Heavy:</b> Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	<b>50-100#</b>	<b>25-50#</b>	<b>10-20#</b>
	<b>Very Heavy:</b> Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	<b>Over 100#</b>	<b>Over 50#</b>	<b>Over 20#</b>
List any other physical requirements or bona fide occupational qualifications:				

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.