

## UW HEALTH JOB DESCRIPTION

### AMBULATORY ACCESS LEAD

Job Code: 300053	FLSA Status: Non-Exempt	Mgt. Approval: R. DenHerder	Date: November 2022
Department: Ambulatory Access Operations		HR Approval: B. Haak	Date: November 2022

### JOB SUMMARY

The Ambulatory Access Lead serves as a team lead for patient scheduling staff who are often the first contact for patients when they visit or contact one of our clinics. The lead role is instrumental in shaping the culture of the team through strong interpersonal communication and excellent customer service. Leads maintain department scheduling guidelines and train staff members across many work locations. Leads are responsible for regularly monitoring email, chatrooms, and other approved communication methods, to ensure all staff member questions are answered in a timely manner. The lead will take on the most complex patient cases and serve as an escalation point for team members who need assistance with difficult patient interactions. The lead may assist the supervisor in monitoring and coordinating the work activities of patient scheduling staff.

There are two tracks for the lead: 1) serving as the subject matter expert and lead for 1-2 assigned specialties or 2) serving as a scheduling workflow expert that provides process improvement and project-related support across the department. Both tracks require using strong communication skills with a diverse group of colleagues and highly effective problem resolution skills. Leads in both tracks will participate in cross functional projects. The leads will identify opportunities and drive process improvement across the teams.

In addition to lead duties, this position is also responsible for performing patient scheduling duties including greeting patients and working with them in person, on the phone, or through electronic correspondence to meet their needs regarding scheduling, updating patient information, and checking patients in and out of their appointment. As outstanding team members with demonstrated friendliness, flexibility, and mastery of scheduling practices for multiple areas, scheduling leads will fill in where needed across locations, serve in design groups, and receive training to support scheduling improvement projects. This position will be required to work at multiple sites throughout the Madison area, including the appointment center, clinic, and hospital facilities. They will be continuous learners, demonstrating the ability to be flexible and adaptive to changing environments.

### MAJOR RESPONSIBILITIES

Major responsibilities of the Ambulatory Access Lead will vary depending on the role in which they are employed.

#### Specialty Scheduling Lead

**Performs all levels of scheduling from basic to complex. Lead duties may include but are not limited to:**

1. Serve as content expert for assigned specialty(ies) across all relevant work locations. This will include working across multiple sites.
2. Provide real-time support as team members encounter new or challenging situations. This may include assisting in handling patient escalations.
3. Provide training for new patient scheduling employees as well as other staff who may need to learn scheduling functions.
4. Develop and maintain training and workflow documents for patient scheduling. Ensure regular communication to team members about workflow updates.
5. Audit scheduling work and provide training and reinforcement to staff on standard workflows and scheduler practices.
6. Serve as a team leader in addressing patient scheduling issues, effective communication, and problem solving. This includes attending meetings and participating in process improvement initiatives.

**And/or**

#### Department Scheduling Lead

**Performs all levels of scheduling from basic to complex. Lead duties may include but are not limited to:**

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1. In support of the department mission to provide consistent service across all specialties and locations; shift support to new specialties on short notice, learn quickly, identify and prioritize top needs, and assist in meeting those needs.
2. Identify and share best practices across specialties in close collaboration with leaders in each specialty.
3. Participate in the development of training materials, workflows, and best practices.
4. Provide training, support, and coverage as needed for teams engaged in transformational change.
5. Provide at-the-elbow support for scheduling staff members as new workflows are implemented.

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

### JOB REQUIREMENTS

Education	Minimum	High school diploma or equivalent
	Preferred	Associate or Bachelor's degree in Business Administration, Healthcare, or other related field
Work Experience	Minimum	One (1) year of customer service, training, or other leadership experience.
	Preferred	One (1) year of experience in customer service, training, or other leadership positions in a healthcare setting.
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>• Ability to use computers including a variety of word processing and spreadsheet software programs (i.e. MS Word, MS Excel)</li> <li>• Knowledge of medical terminology</li> <li>• Demonstrated leadership skills</li> <li>• Ability to communicate new information in a clear and concise manner</li> <li>• Ability to train new and tenured staff in workflows and technology</li> <li>• Ability to answer phones, greet clients and customers in person, and schedule appointments.</li> <li>• Ability to handle multiple priorities simultaneously.</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 to collaborate with a variety of individuals in a positive manner.</li> <li>• Ability to travel to and work from UW Health locations in the Madison area.</li> </ul>

### 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.*

Physical Demand Level		Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
<b>x</b>	<b>Sedentary:</b> Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, 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>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>

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	<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.