

UW HEALTH JOB DESCRIPTION

APPOINTMENT CENTER SPECIALIST

Job Code: 300063	FLSA Status: Non-Exempt	Mgt. Approval: J. Bledsoe	Date: September 2022
Department: Clinics – Ambulatory Access		HR Approval: B. Haak	Date: September 2022

JOB SUMMARY

Appointment Center Specialists are often the first people to greet and work with patients who choose UW Health for their care, so outstanding customer service skills, compassion, and empathy are critical in this role. This position includes scheduling patients seeking an appointment at UW Health. Appointment Center Specialists schedule appointments, take, route, and follow up on messages with clinics, and coordinate procedure and diagnostic orders as necessary for patient care. The incumbent ensures that patients flow through the scheduling and registration processes quickly and efficiently following consistent processes, while also delivering great experiences through compassionate interaction.

The Appointment Center is structured into pods that support multiple specialties. Scheduling for designated specialties in the appointment center requires communication and coordination with multiple disciplines and ancillary departments at all UW Health locations. Because each pod schedules for all locations that offer services in their specialty areas of focus, each pod will typically schedule for more than 100 providers. In addition, the Appointment Center Specialist is responsible for advanced level scheduling of patients. This includes the coordination of multiple, complex appointments, and resolution of patient related issues. This position is responsible for assisting in training of other employees in patient scheduling positions. Individuals in this position perform the complex scheduling duties greater than 50% of work time.

Appointment Center Specialists are critical team members to ensuring good customer service and patient access across UW Health as we transition many scheduling duties to the central appointment center. They are responsible for mastering the workflows for multiple specialties. As outstanding team members with demonstrated friendliness, flexibility, and mastery of scheduling and registration practices for multiple areas, incumbents will fill in where needed as on-site schedulers serve in design groups, on committees, or receive training to support scheduling optimization design and as some on-site schedulers transition to the appointment center. Appointment Center Specialists will be required to work at multiple sites throughout the Madison area, including the appointment center and clinic and hospital facilities. They will be continuous learners, demonstrating the ability to be flexible and adaptive to changing environments.

Incumbents will also serve as super users in the scheduling areas they support. They will be knowledgeable about workflows and best practices and will be responsible for spreading their knowledge to those they interact with at the various sites they support.

MAJOR RESPONSIBILITIES

Performs all levels of scheduling from basic to complex. Complex scheduling must be greater than 50% of time worked and may include, but is not limited to:

1. Procedure Scheduling - Perform duties to facilitate and coordinate scheduling of non-surgical procedures such as:
 - a. Complete procedure request including equipment, rooms and time commitments needed
 - b. Coordinate physicians schedules and reserve time on Physicians calendars
 - c. Link other resources as needed
2. Highly variable scheduling work typically due to scheduling in a Specialty Care environment. Examples of highly variable scheduling work include:
 - a. Scheduling treatment plans
 - b. Conducting pre-referral work
 - c. Coordinating multiple appointments across multiple locations and/or specialties
 - d. Scheduling in two or more systems
3. Multi-Disciplinary Scheduling – Comprehensive clinics with more than one billing provider in which multiple providers across multiple disciplines require scheduling for the same date of service for a patient.

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Performs all levels of scheduling from basic to complex. Complex scheduling must be greater than 50% of time worked and may include, but is not limited to:

4. Procedure Scheduling - Perform duties to facilitate and coordinate scheduling of non-surgical procedures such as:
 - a. Complete procedure request including equipment, rooms and time commitments needed
 - b. Coordinate physicians' schedules and reserve time on Physicians calendars
 - c. Link other resources as needed
5. Highly variable scheduling work typically due to scheduling in a Specialty Care environment. Examples of highly variable scheduling work include:
 - a. Scheduling treatment plans
 - b. Conducting pre-referral work
 - c. Coordinating multiple appointments across multiple locations and/or specialties
 - d. Scheduling in two or more systems
6. Multi-Disciplinary Scheduling – Comprehensive clinics with more than one billing provider in which multiple providers across multiple disciplines require scheduling for the same date of service for a patient.

In addition to performing complex scheduling duties more than 50% of the time, employees in this title perform basic scheduling duties including but not limited to:

1. Meet patient needs through a variety of methods including but not limited to:
 - a. Answer incoming phone calls and make outbound phone calls, gathering information to route appropriately
 - b. Schedule appointments via phone or via electronic correspondence
 - c. Schedule follow up appointments
 - d. Coordinate appointments for patients in other clinics
 - e. Coordinate Lab and Radiology appointments
 - f. Cancel and reschedule appointments
 - g. Manage electronic worklists
 - h. Follow scheduling questionnaires and established scheduling guidelines.
 - i. Work incoming appointment requests from outside providers, incoming messages report, and other inbound referrals as assigned.
 - j. Assign needed clinical questionnaires when appropriate.
 - k. Clearly document patient requests that require follow-up from the clinic, and route those requests appropriately.
 - l. Warm transfer high priority calls to the appropriate clinic staff member.
 - m. Check in patients
 - n. Make walk-in appointments
 - o. Check out patients and print after visit summaries
 - p. Promote and assist patients in kiosk use
 - q. Manage templates for day to day edits and reschedules
2. Create and maintain patient records:
 - a. Verify and update patient demographics
 - b. Verify visit account and insurance information and transfer to Registration if updates are needed
3. Manage visit prior authorization and referral requirements:
 - a. Counsel patients on prior authorization, referral requirements, and insurance networks as prompted by HealthLink
 - b. Evaluate referrals and link to appropriate upcoming appointments
 - c. Counsel patients on financial responsibility form if referral is not obtained by time of service and collect signature
 - d. Ensure the patient's insurance reflects the correct filing order.
 - e. Educate and screen patients for financial assistance.
 - f. Submit online requests for prior authorization to be completed by UWH Prior

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Authorization department. Track and manage the request through to appointment resolution.

4. Provide excellent customer service to patients and family members:
 - a. Communicate in a manner consistent with positive patient relations
 - b. Demonstrate a welcome environment by smiling and making eye contact when greeting all patients and family members.
 - c. Provide helpful assistance in anticipating and responding to the needs of all patients and family members.
 - d. Collaborate with callers in planning and decision making to result in optimal solutions.
 - e. Remain calm under pressure and effectively deal with difficult people.
 - f. Independently recognize, interpret, and evaluate situations and their level of urgency.
5. Other miscellaneous tasks could include:
 - a. Assist with the orientation and training of other employees
 - b. Maintains or initiates faxes
 - c. Maintain desk and/or clinic supplies
 - d. Sort and distribute mail
 - e. 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	Associate or bachelor's degree in Business Administration, Healthcare, or related field.
Work Experience	Minimum	One (1) year of experience in patient scheduling or equivalent experience working in a medical office environment
	Preferred	Two (2) years of experience working as a UW Health Scheduler or 1 year of experience as a scheduler in the UW Health Appointment Center or Assisted Scheduling departments.
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> • Excellent verbal, listening, and written communication skills. • Demonstrated ability to provide excellent, compassionate customer service. • Ability to operate a computer • Efficient and accurate typing skills. • Knowledge of medical terminology and abbreviations preferred. • Knowledge of third-party payors and billing requirements preferred. • Ability to: <ul style="list-style-type: none"> ○ Learn new workflows and adapt to frequently changing work environments. ○ Think independently and demonstrate effective problem-solving skills. ○ Prioritize and complete required tasks within established time schedules. ○ Work in a team environment and to collaborate with a variety of personnel.

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. Next,

<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*

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<i>may be made available for individuals with disabilities to perform the essential functions of this position.</i>				
Physical Demand Level		Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
x	Sedentary: 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.	Up to 10#	Negligible	Negligible
	Light: 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.	Up to 20#	Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	Negligible or constant push/pull of items of negligible weight
	Medium: Ability to lift up to 50 pounds maximum with frequent lifting/and or carrying objects weighing up to 25 pounds.	20-50#	10-25#	Negligible-10#
	Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	50-100#	25-50#	10-20#
	Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	Over 100#	Over 50#	Over 20#
Other - list any other physical requirements or bona fide occupational qualifications not indicated above:				

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.