

UW HEALTH JOB DESCRIPTION

PATIENT SCHEDULING LEAD

Job Code: 300056	FLSA Status: Non-Exempt	Mgt. Approval: W. Adams/P. Zellmer	Date: 4.2017
Department: Across the system		HR Approval: nnl	Date: 6.2019

JOB SUMMARY

The Patient Scheduling Lead serves as a team lead over other Patient Scheduling staff that are often the first contact of patients when they visit or contact one of our sites or facilities. As a team lead this position coordinates, assigns and guides the work activities of other patient scheduling staff. This position monitors work schedules, maintains department scheduling guidelines and templates, and trains and mentors new staff.

In addition to lead worker 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, checking patients in and out and acting as a liaison in reporting any patient suggestions to management. The role is also responsible for advanced level scheduling of patients, including coordination of multiple, complex appointments, and resolution of patient related issues.

MAJOR RESPONSIBILITIES

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

1. Assist and act as liaison for the manager in patient scheduling issues, training, education, communication and problem solving.
2. Establish daily work schedules for patient scheduling staff.
 - a. Ensure adequate coverage at all times.
 - b. Assist manager with vacation and holiday requests.
 - c. Maintain continuity while providing coverage for absences.
3. Provide orientation for all new patient scheduling employees and other clinical staff who may need to learn scheduling functions.
4. Provide positive guidance, training, and monitoring of staff on processes of scheduling, and other patient scheduling functions.
5. Develop and maintain training and workflow documents for patient scheduling.
6. Monitor telephone statistics daily and intervene as needed to meet standards.
7. Ensure that policies and procedures are current, accurate and understood by patient scheduling employees when disseminating information.
8. Serve as resource person and provide information to patient scheduling staff and patients regarding insurance, Unity and other HMO systems.
9. Act as a liaison between manager, technical staff, patients, departments and services such as Information Technology, Registration, Patient Relations, etc.
10. Recommend and advise manager on clinic related issues, problem occurrences, changes in activity, etc.
11. Act as a liaison between clinic and Fiscal Affairs with Medicare and other insurance guidelines.
12. Function as a primary schedule template builder and reviewer and assist other staff in learning this process. Monitor existing templates and maintain daily schedules for resources.
13. Assist manager in ensuring clinic staff is compliant with all hospital standards (i.e. confidentiality).
14. Act as an excellent role model and customer service resource.
15. May contribute to peer review for performance evaluations.

In addition to performing lead worker duties, employees in this title perform basic or complex scheduling duties included 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. Check in patients
 - c. Make walk-in appointments

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- d. Check out patients and print after visit summaries
 - e. Schedule appointments via phone, in person or via electronic correspondence
 - f. Schedule follow up appointments
 - g. Coordinate appointments for patients in other clinics
 - h. Coordinate Lab and Radiology appointments
 - i. Cancel and reschedule appointments
 - j. Manage electronic worklists
 - k. Manage templates for day to day edits and reschedules
 - l. Promote and assist patients in kiosk use
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
 - c. Create hospital account records
 - d. Complete Medicare as a Secondary Payor Questionnaire as needed
 - e. Collect patient photographs, document signatures and insurance card scans
 - f. Collect copays, pre-payments and outstanding balances
 - g. Generate MyChart activation codes
 - h. Update and verify primary care and referring providers
 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. Submit online requests for prior authorization to be completed by UWH Prior Authorization department. Track and manage the request through to appointment resolution.
 - d. Counsel patients on financial responsibility form if referral is not obtained by time of service and collect signature
 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 customers 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. Surgery or Procedure Scheduling – Serve as case requestors and perform duties to facilitate and coordinate scheduling of surgeries and/or procedures such as:
 - a. Complete surgery or procedure request including what equipment, rooms and time commitments are needed
 - b. Coordinate physicians schedules and reserve time on Physicians calendars
 - c. Linking other resources as needed
 6. 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
 7. 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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8. Other miscellaneous tasks could include:
- a. Maintains or initiates faxes
 - b. Maintain desk and/or clinic supplies
 - c. Sort and distribute mail
 - d. 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 other related field
Work Experience	Minimum	Twelve months of experience in patient scheduling or equivalent experience working in a medical office environment
	Preferred	
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities	<ul style="list-style-type: none"> • Excellent customer service skills • Excellent verbal, listening and written communication skills. • Ability to use computers including a variety of word processing and spreadsheet software programs (i.e. MS Word, MS Excel). • Ability to use computers for entering appointment information and patient billing • Knowledge of Medical terminology • Demonstrated leadership skills. • Demonstrated strong interpersonal communication skills in a complex organization • Ability to answer phones, greet clients and customers in person, and schedule appointments. • Ability to handle multiple priorities simultaneously. • Excellent organizational skills. • Ability to think independently and demonstrate good problem-solving skills. • Ability to work in a team environment and to collaborate with a variety of individuals in a positive manner. 	

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
x	Sedentary: 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.	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#
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.

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