

UW HEALTH JOB DESCRIPTION

PATIENT SCHEDULING REPRESENTATIVE

Job Code: 300054	FLSA Status: Non-Exempt	Mgt. Approval: G. Lanz	Date: March 2024
Department: Across the system		HR Approval: J. McCoy	Date: March 2024

JOB SUMMARY

The Patient Scheduling Representative is often the first contact of patients when they visit one of our sites, facilities or outreach to the after-hours triage team. This position is responsible for greeting patients and working with them in person, on the phone or through electronic correspondence to meet their needs regarding scheduling, updating patient information, or helping patients navigate the healthcare system after-hours, checking patients in and out and/or acting as a liaison in reporting any patient suggestions to management.

MAJOR RESPONSIBILITIES

1. Meet patient needs through a variety of methods which may include but not limited to:
 - a. Answer incoming phone calls and/or make outbound phone calls, gathering information to route appropriately.
 - b. Facilitate warm handoffs when the department is reached in error.
 - c. Check in patients.
 - d. Make walk-in appointments.
 - e. Check out patients and print after visit summaries.
 - f. Schedule appointments via phone, in person or via electronic correspondence.
 - g. Schedule follow up appointments.
 - h. Coordinate appointments for patients in other clinics.
 - i. Coordinate Lab and Radiology appointments.
 - j. Cancel and/or reschedule appointments if appropriate and/or send messages to the corresponding department..
 - k. Manage electronic worklists.
 - l. Manage templates for day to day edits and reschedules.
 - m. Promote and assist patients in kiosk use.
2. Create and maintain patient records which may include:
 - a. Verify and update patient demographics.
 - b. Verify visit account and insurance information and transfer to Registration if updates are needed.
 - c. Create 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/or verify primary care and referring providers.
3. Manage visit prior authorization and referral requirements which may include:
 - 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 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 based on organizational guidelines.
 - g. Help in setting realistic patient expectations for call backs.

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5. Other miscellaneous tasks may include:

- a. Assist with the orientation and training of other employees.
- b. Message triage call to place in ques following departmental and organizational guidelines as appropriate to the department.
- c. Maintain or initiate faxes.
- d. Maintain desk and/or clinic supplies.
- e. Sort and distribute mail.
- f. Contribute to the smooth operation of practice.
- g. Encourage staff and represents department in a positive manner.
- h. Attend staff and departmental meetings.
- i. Participate in departmental process improvement.
- j. Timely complete organizational requirements.
- k. Other duties as assigned.

ALL APPLICABLE 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	6 months of previous experience in an office or customer service environment
	Preferred	<ul style="list-style-type: none"> • Previous experience working in healthcare • Previous experience scheduling of patients • Previous experience with answering phones, greeting clients and customers in person
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 operate a computer • Knowledge of Medical Terminology preferred • 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

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,

	Infants (Birth – 11 months)		Adolescent (13 – 19 years)
	Toddlers (1 – 3 years)		Young Adult (20 – 40 years)
	Preschool (4 – 5 years)		Middle Adult (41 – 65 years)
	School Age (6 – 12 years)		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.*

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	Up to 10#	Negligible	Negligible

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	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.			
	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-
	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.