

UW HEALTH JOB DESCRIPTION

PATIENT SCHEDULING SPECIALIST

Job Code: 300055	FLSA Status: Non-Exempt	Mgt. Approval: J. Tovar	Date: November 2019
Department: Across the system		HR Approval: J. Olson	Date: November 2019

JOB SUMMARY

The Patient Scheduling Specialist is often the first contact of patients when they visit one of our sites or facilities. 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, checking patients in and out, and acting as a liaison in reporting any patient suggestions to management.

In addition, the Patient Scheduling 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.

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 physician schedules and reserve time on physician 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.

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. Check in patients
 - c. Make walk-in appointments
 - 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

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- 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 the electronic medical record
 - 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. Other miscellaneous tasks could include:
- a. Assist with the orientation and training of other employees
 - b. Maintain 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 other related field
Work Experience	Minimum	1 year of previous experience working in an office or customer service environment
	Preferred	<ul style="list-style-type: none"> • Previous experience working in healthcare • Previous experience scheduling patients • Previous experience coordinating multiple activities in an office setting
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

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
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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.