

UW HEALTH JOB DESCRIPTION

SCHEDULING OPERATIONS SPECIALIST, LEAD

Job Code: 450029	FLSA Status: Non-Exempt	Mgt. Approval: W. Wright	Date: September 2023
Department: Ambulatory Access		HR Approval: B. Haak	Date: September 2023

JOB SUMMARY

The Scheduling Operations Specialist, Lead serves as a team lead for Scheduling Operations Specialist staff responsible for centralized provider template management across Ambulatory Care. The scheduling Operations Specialist, Lead will work closely with Clinic, Scheduling and Ambulatory Access Leadership to develop and improve processes, standards, tools and documentation. This position monitors requests and tracks completion of work using a variety of applications, as well as performs audits and identifies areas of improvement across all specialties.

In addition to lead worker duties, this position is also responsible for performing Scheduling Operations Specialist duties including maintaining provider scheduling templates in Epic for multiple specialty groups following best practices, standard design guidelines, and UW Health's service standards.

MAJOR RESPONSIBILITIES

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

1. Assist and act as liaison for Ambulatory Access Optimization leadership with template issues, training, education, communication, and problem solving.
2. Analyze and develop processes, standards, tools, and documentation to support centralized template management.
3. Assist in training and onboarding new team members.
4. Be a team leader by assisting in the implementation of new specialties for template management.
5. Provide ongoing support for Scheduling Operations Specialists as they provide template management across all specialties.
6. Act as subject matter expert for template management processes
7. Develop and maintain training and workflow documents for scheduling operations specialists.
8. Ensure that policies and procedures are current, accurate and understood by all specialists when disseminating information.
9. Act as an excellent role model and customer service resource.
10. May contribute to peer review for performance evaluations.
11. Earn Cadence proficiency status within 6 months.

In addition to performing lead worker duties, employees in this title perform basic and complex template duties included but not limited to:

1. Build and maintain clinic and provider templates.
2. Complete various requests including but not limited to: Single/multiple day vacations, structural changes to a provider (or multiple provider's) day (Master Changes), multiple month assignments for all providers within the department (published schedule process).
3. Ensure the work we do aligns with strategic goals, guiding principles, and service standards.
4. Communicate and collaborate with Scheduling Operations Analysts, clinical and non-clinical leaders to support access.
5. Ensure integrity of clinic and provider templates through regular system audits.
6. Participate in the development of documentation, guidelines, and/or policies and procedures that relate to clinic and provider templates.
7. Serve as a content expert for template build through project team participation and access meetings as requested.
8. Disseminate information regarding reschedules to ensure patients are moved appropriately.
9. Demonstrate accountability by understanding clinic flow and provide expertise and training for new staff members working in the clinic.
10. Maintain provider template workbooks to ensure the source of truth is accurate and up to date.

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11. Analyze and ask questions when new workflows or technology is implemented, act as a subject matter expert for current workflows to avoid things getting missed/overlooked in transition.
12. Identify areas of improvement and optimization, knowing when to pull in Analysts.

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 working in an ambulatory clinic and/or building templates in Epic.
	Preferred	Two (2) years working in an ambulatory clinic and/or building templates in Epic. Experience using Epic Cadence and Prelude software.
Licenses & Certifications	Minimum	
	Preferred	Cadence Certification or Proficiency
Required Skills, Knowledge, and Abilities		
<ul style="list-style-type: none"> • Attention to detail; thoroughness and follow-up required. • Excellent organizational skills. • Excellent knowledge and demonstrated proficiency of Microsoft Suite applications, including Word, Excel and PowerPoint required. Use of Visio or expertise in flow diagramming preferred. • Excellent oral and written communication skills. • Knowledge of Medical Terminology • Ability to demonstrate flexibility and adaptability with changing priorities. • Self-motivated. Ability to work proactively and independently and prioritize workload to complete tasks and operations related projects with minimal direction. • Ability to address needs, make improvements, and work proactively. • Professional demeanor and work habits required. • Role model for Behavior Standards and responsive to all who interact with Ambulatory Access. 		

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 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.