

UW HEALTH JOB DESCRIPTION

CREDIT BALANCE RESOLUTION REPRESENTATIVE

Job Code: 440036	FLSA Status: Non-Exempt	Mgt. Approval: D. Christiansen	Date: November 2021
Department: Patient Accounting & PBS-General		HR Approval: S. Whitlock	Date: November 2021

JOB SUMMARY

Under the general supervision of the Payment Posting and Credit Balance Supervisors, the Credit Balance Resolution Representative is responsible for working with patients and third-party payers regarding payments made to UW Health professional and hospital accounts. The position handles a specific group of accounts (credit balance, undistributed payments, and requests for refunds) and ensures timely and accurate resolution. The position is responsible for working with UW Health internal and external customers (e.g., third party payers, patients/guarantors, estate representatives, attorneys, employers, and UW Health employees) to facilitate the prompt resolution of credit balances or requests for refunds.

This position is responsible for resolving insurance and patient overpayments, undistributed payments and requests for refunds. This involves researching insurance benefits, understanding coordination of benefits between payers, distributing/reapplying or transferring payments to the appropriate date of service/provider or account, and then updating account adjustments, generating refund requests, overpayment notifications or denying refund request according to guidelines. Accurate and timely resolution of overpays, undistributed payments and requests for refunds is based on a knowledge and understanding of contractual obligations as well as regulatory requirements.

This position represents UW Health and the Revenue Cycle team by adhering and upholding the UW Health Mission, Vision, and Values, and UW Health Service Performance Standards in providing the highest quality service. They will support their co-workers, engage in positive interactions, and provide helpful assistance in anticipating and responding to the needs of our customers

MAJOR RESPONSIBILITIES

Core Responsibilities:

- Responsible for credit balances, undistributed payments and requests for refunds for UW Health and its affiliates
- Conducts timely and accurate review of undistributed payments, overpayments, credits and requests for refunds in the practice management system. Responsible for taking all steps necessary to facilitate prompt and accurate resolution of payments including follow up with third party payers to determine coordination of benefits, insurance primacy rules and filing order.
- Effectively communicate information about insurance billing and follow-up processes to patients and internal customers
- Initiate refunds to patients/guarantors, insurance companies, and other third parties by following established refund procedures, contractual obligations, payer and regulatory requirements.
- Conduct timely and accurate review of refund requests for payers with contracted recoupment language to reduce future recoupment reconciliations.
- Responsible for reviewing, validating and correcting adjustments on accounts based on insurance reimbursement and coverage, contracted payers, and services provided.
- Redistribute and/or transfer payments between UW Health accounts.
- Validate and update patient demographic and insurance information to ensure accuracy of future claims.
- Reconcile misdirected and clearing accounts by researching and posting payments to the correct accounts

Customer Service Standards:

- Support co-workers and engage in positive interactions.
- Communicate professionally and timely with internal and external customers
- Demonstrate friendliness by smiling and making eye contact when greeting all customers.
- Provide helpful assistance in anticipating and responding to the needs of our customers.
- Collaborate with customers in planning and decision making to result in optimal solutions.
- Ability to stay calm under pressure and deal effectively with difficult situations.

ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.

JOB REQUIREMENTS

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Education	Minimum	High School Diploma or equivalent
	Preferred	Associate degree in Business, Finance, Health Information Management, or another related field
Work Experience	Minimum	One (1) year of experience in an insurance, finance, medical office, or customer service-related field.
	Preferred	<ul style="list-style-type: none"> Revenue Cycle (healthcare business, financial, or insurance) experience Epic experience Knowledge of medical and insurance terminology, CPT, ICD coding structures, and billing forms (UB, 1500)
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> Ability to make good judgments in demanding situations Ability to react to frequent changes in duties and volume of work Effective communication skills Ability to listen empathetically Ability to logically and accurately organize details Ability to manage multiple tasks with ease and efficiency Self-starter with a willingness to try new ideas Ability to work independently and be result oriented Positive, can-do attitude coupled with a sense of urgency Effective interpersonal skills, including the ability to promote teamwork Strong problem-solving skills Ability to ensure a high level of customer satisfaction including employees, patients, visitors, faculty, referring physicians and external stakeholders Ability to use various computer applications including EPIC Excellent PC operating skills (keyboard, mouse) and use of MS Office Broad knowledge of health care business office practices and principles Basic math skills and knowledge of general accounting principles Maintain confidentiality of sensitive information Knowledge of Business Office policies and procedures Knowledge of local, state and federal healthcare regulations Knowledge of Microsoft Office

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 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 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 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 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.