

## UW HEALTH JOB DESCRIPTION

### Financial Clearance Lead

Job Code: 440040	FLSA Status: Non-Exempt	Mgt. Approval: R Klein	Date: Dec. 2023
Department: Rev Cycle – Financial Clearance		HR Approval: A. King	Date: Dec. 2023

### JOB SUMMARY

The Financial Clearance Lead oversees the daily operations of specific pod-based workflows within the Financial Clearance Department. The lead partners closely with Financial Clearance leadership to provide leadership coverage and presence to the financial clearance team. This individual is responsible for ensuring the effective operations through organizing, scheduling, while monitoring department workloads, work quality, priorities, productivity metrics and coordinating and performing training as needed. They will be responsible for ensuring that financial clearance staff are prioritizing work appropriately that may have a negative impact to the patient financial experience. The Lead will serve as the first line of escalation for staff questions on workflows, processes and decisions on coverage issues

The incumbent is responsible for training new staff, assisting in the planning and development of training materials, assisting in the development and implementation of quality assurance processes, supporting process improvement projects and serving as a go-to resource to staff. This individual will be responsible for ensuring the effective operations of the day-to-day activities of financial clearance. This person will identify areas for improvements and develop plans for improving the quality of these processes.

This position is customer service driven and the incumbent must have the ability to effectively promote positive customer service while working in a highly stressful and complex environment. The Lead can quickly assess an urgent situation and provide issue resolution and de-escalation.

A substantial portion of the normal duties of the incumbent requires proper judgment, sensitivity, and strict adherence to UW Health policy on confidentiality.

*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

#### Lead Responsibilities:

- Provide general support to the Financial Clearance team as it relates to the Pre-Registration workflows:
  - Trains new staff, provides ongoing training for existing staff and maintains training checklists, ensuring adequate training has been completed or is ongoing to team members within their area of expertise.
  - Completes quality improvement and productivity activities.
  - Serves as a knowledge expert and an escalation point for staff questions and concerns. Assists with questions regarding team functions, workflows, and direction.
  - Supports and implements policies and procedures for the department and monitors adherence to them, including performing quality assurance tasks as requested.
  - Manages and organizes staff schedules to ensure adequate coverage within operational hours.
  - Manages text message system and payer review WQs to ensure proper billing.
  - Is an Administrator on payer websites for Financial Clearance Team members, as well as across the organization when the need arises.
  - Assists with billing and filing order issues.
- Provides support to Financial Clearance Leadership
  - Provides back up to supervisor during office outages, including approving time off requests, supporting staffing changes, answering questions, and handling escalations that may come up from a patient or provider call.
  - Supports process improvement projects and revenue cycle initiatives as they relate to the pre-registration function for financially clearing a patient.
  - Monitors workloads and moves staff around appropriately to ensure the work is completed timely and appropriately to support the Financial Clearance workflows.

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### Core Responsibilities:

- Performs training and re-training, maintenance of training tools and tip sheets, supports and educates clinical partners and supports process improvement initiatives – about 50% of their time.
- Completes Financial Clearance Representative duties across areas within the Pod structure and provides first line of support to team members for issues that arise – about 50% of their time.
- Expert in all areas within their pod so they can provide expertise and support to front line staff, as well as clinical partners, and leadership, when questions come up.
- Knowledgeable on all services covered under the Financial Clearance umbrella to support cross functional pod questions and integration.
- Escalates issues and concerns identified by team members which may be leading to a negative outcome on financially clearing a patient for an upcoming service.
- Takes the lead on projects, as assigned by leadership.
- Completes all duties that a Financial Clearance representative is responsible for, including, but not limited to: completing registration paperwork, faxes, MyChart updates, EZ appointment requests, Incoming Messages Report, and CRM requests for coordination of benefit changes, managing patient insurance referral obligations, entry of referrals, and linking them to appropriate upcoming appointments, validating correct coverage is listed on patient for upcoming services.

**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 Degree in Business, Finance, Health Info Management, or related field.
Work Experience	Minimum	Two (2) years of experience in a patient access, healthcare revenue cycle, or a clinic operations role
	Preferred	Three (3) years of experience in a patient access, healthcare revenue cycle, or clinic operations role with progressive leadership responsibilities.
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>• Advanced knowledge of practices and procedures followed in the Revenue Cycle</li> <li>• Mastery of the responsibilities and skills required to do complex Revenue Cycle work, including advanced knowledge of insurance plans and benefits.</li> <li>• Ability to assist with special projects and initiatives.</li> <li>• Aptitude and willingness to assume additional responsibility and a leadership role within and across departments.</li> <li>• Effective interpersonal skills which foster a team approach to problem solving and ensure a high degree of customer satisfaction and service.</li> <li>• Expertise in complex problem-solving and decision-making skills.</li> <li>• Must independently recognize and evaluate situations for the level of urgency.</li> <li>• Strong emotional intelligence and empathy.</li> <li>• Excellent written and oral communication skills.</li> <li>• Maintains effective and cooperative working relationships with co-workers, leaders, clinical staff and the general public.</li> <li>• Must be detail oriented and accurate.</li> <li>• Ability to multi-task and prioritize tasks.</li> <li>• Displays an aptitude and willingness to learn new responsibilities.</li> <li>• Willingly accepts feedback.</li> </ul>

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	<ul style="list-style-type: none"> <li>Flexible and innovative.</li> <li>Displays a professional appearance.</li> <li>Dependable and reliable in achieving goals.</li> <li>Experience operating office machines such as personal computers, fax machines, photocopier, and document scanners.</li> <li>Knowledge of medical terminology and abbreviations.</li> </ul>			
<b>PHYSICAL REQUIREMENTS</b>				
<b>Indicate the appropriate physical requirements of this job in the course of a shift.</b> <i>Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.</i>				
<b>Physical Demand Level</b>		<b>Occasional</b> Up to 33% of the time	<b>Frequent</b> 34%-66% of the time	<b>Constant</b> 67%-100% of the time
<b>X</b>	<b>Sedentary:</b> 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.	<b>Up to 10#</b>	<b>Negligible</b>	<b>Negligible</b>
	<b>Light:</b> 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.	<b>Up to 20#</b>	<b>Up to 10#</b> or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	<b>Negligible</b> or constant push/pull of items of negligible weight
	<b>Medium:</b> Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	<b>20-50#</b>	<b>10-25#</b>	<b>Negligible-</b>
	<b>Heavy:</b> Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	<b>50-100#</b>	<b>25-50#</b>	<b>10-20#</b>
	<b>Very Heavy:</b> Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	<b>Over 100#</b>	<b>Over 50#</b>	<b>Over 20#</b>
List any other physical requirements or bona fide occupational qualifications:				

**Work/Environmental:** Individuals are assigned to primary clinic locations, but are required to travel between sites as needed for leadership coverage, staff training, and team meetings.

**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.