

UW HEALTH JOB DESCRIPTION

Financial Counseling Lead

Job Code: 440042	FLSA Status: Non Exempt	Mgt. Approval: L. Grant	Date: November 2020
Department : Rev Cycle – Financial Counseling		HR Approval: J. Theisen	Date: November 2020

JOB SUMMARY

The Financial Counseling Lead oversees the daily operations of specific work units within the Patient Access Department. The lead partners closely with the Patient Access Supervisors to provide leadership coverage and presence to the financial counseling work units. This individual is responsible for ensuring effective operations through organizing, scheduling, and monitoring department workload. In addition, this individual will monitor work quality and productivity metrics and coordinate training as needed. The Lead will serve as the first line of escalation for staff questions on workflows and processes.

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 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 counseling. 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 is able to quickly assess an urgent situation and provide issue resolution and de-escalation.

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 assistance to the Financial Counseling teams:
 - Train new staff and provide ongoing training for existing staff
 - Complete quality improvement and productivity activities
 - Serve as a knowledge expert and an escalation point for staff questions and concerns. Assist with questions regarding team functions and assist with team direction
 - Implement policies and procedures for the department and monitor adherence. Gather and enter departmental and program specific productivity and quality of service statistics from various reporting systems.

Core Responsibilities:

- Serve as the point of contact for all financial assistance related questions. Communicate with patients to identify and understand financial, social, and medical histories and other relevant patient information
- Gather all relevant information required to process financial assistance requests; including but not limited to working with providers on treatment plans, best practices, and related necessary medical opinions. Document all communication and follow up in the EMR
- Assess the current financial situation of patients through the verification of patient insurance benefits; serving as the technical expert in confirming patients benefit coverage and hospital reimbursement
- Determine eligibility for care at UW Health by assessing patient eligibility for Medical Assistance, Emergency Medical Assistance, Community Programs, and Government Programs:
 - a. Assess and offer payment alternatives which may include prepayment for elective care, applying for UW Health's financial assistance program, alternative treatments, or receiving care closer to home.
 - b. Consult with UW Health Business Office, Clinicians, Leadership, and Referring Physicians to make determination regarding appropriateness of the request.
 - c. Identify eligible financial programming options and assist in completing all necessary documentation for specific federal, state, or UW Health financial assistance programs.
 - d. Assist in obtaining exceptions to the out of network determinations from insurance companies, escalate if necessary
 - e. With provider involvement, determine urgency of scheduled care for patients with large financial liabilities resulting in either a decision to proceed or a decision to obtain sponsorship.

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- Explain UW Health’s payment policy to patients if a program is not available. Calculate and explain any patient liability before or at the time of service.
- Counsel patients on out of pocket liabilities. Collect deductibles, pre-payments, and outstanding balances following established collection procedures; or alternatively, create a payment plan with the patient and document the agreement appropriately. Reschedule or cancel services as necessary.
- Communicate financial coverage status and applicable financial decisions with all appropriate parties: patient, family, referring clinicians, and UW Health clinicians.

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 years of experience in a patient access, healthcare revenue cycle, or a clinic operations role
	Preferred	Three 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"> • Advanced knowledge of practices and procedures followed in the Revenue Cycle • Mastery of the responsibilities and skills required to do complex Revenue Cycle work, including advanced knowledge of insurance plans and benefits. • Ability to assist with special projects and initiatives. • Aptitude and willingness to assume additional responsibility and a leadership role within and across departments. • Effective interpersonal skills which foster a team approach to problem solving and ensure a high degree of customer satisfaction and service. • Expertise in complex problem-solving and decision-making skills. • Must independently recognize and evaluate situations for the level of urgency. • Strong emotional intelligence and empathy. • Excellent written and oral communication skills. • Maintains effective and cooperative working relationships with co-workers, leaders, clinical staff and the general public. • Must be detail oriented and accurate. • Ability to multi-task and prioritize tasks. • Displays an aptitude and willingness to learn new responsibilities. • Willingly accepts feedback. • Flexible and innovative. • Displays a professional appearance. • Dependable and reliable in achieving goals. • Experience operating office machines such as personal computers, fax machines, photocopier, and document scanners. • Knowledge of medical terminology and abbreviations.

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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 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-
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:

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.