

## UW HEALTH JOB DESCRIPTION

### FINANCIAL COUNSELOR TRANSPLANT

<b>Job Code: 440044</b>	<b>FLSA Status: Non-Exempt</b>	<b>Mgt. Approval: S. Droste</b>	<b>Date: 11.2018</b>
<b>Department: Admissions, 30020</b>		<b>HR Approval: A. King</b>	<b>Date: 11.2018</b>

### JOB SUMMARY

The Transplant Financial Counselor functions as a technical expert regarding transplant financial reimbursement and insurance coverage. The Transplant Financial Counselor requires a thorough understanding of various complex transplant contracts, payer requirements, and Medicare and Medical Assistance transplant coverage regulations. This position must keep abreast of all regulations and guidelines regarding transplants as well as insurance requirements. The Transplant Financial Counselor advises patients on the complexities of transplant insurance benefits, advises patients on the notification and prior authorization/referral requirements, creates estimates and collects prepayments when appropriate, and researches when government programs are available and can be used in conjunction with other payors.

A significant degree of independent judgment and decision making is required due to the extensive level of coordination that occurs between contracted and non-contracted payers, reinsurers, the transplant department, and UWH patient business services. The Transplant Financial Counselors attend meetings with various transplant teams and are responsible for the administrative/financial clearance decision to list a patient for transplant. The Transplant Financial Counselor must be able to work in urgent, high stress situations.

*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:

- Evaluate transplant candidates for financial funding or accurate financial sponsorship
- Verify patient insurance eligibility and benefits specific to the condition requiring a potential organ(s) transplant. Determine the patient's financial ability to pay
- Reviews and analyze complex patient contracts, perform an assessment of financial need and advise the transplant patient of available assistance programs.
- Explain the fiscal requirements and financial liabilities of transplantation; ensure patients and families understand the complex financial details associated with transplant procedures
- Determine, the appropriate financial options for the transplant patient. Provide the patient with appropriate alternatives if applicable:
  - a. Assist in obtaining exceptions or single case agreements from insurance companies.
  - b. Complete the pre-certification/ authorization and referral requirements to ensure insurance approval.
  - c. Provide uninsured patients information regarding the state's high-risk insurance program.
- Explain UW Health's payment policy to patients if full coverage is not available (uninsured or underinsured patients). Calculate or request an estimate for any patient liability before or at the time of services.
- 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
- Provide continued support once the patient has been accepted into the transplant program:
  - a. Finalize the administrative/financial clearance to list a patient for transplant
  - b. Prepare patient admission documents, verify patient transplant insurance benefits and discharge medication coverage.
  - c. Maintain transplant status; monitor and update the waiting list as required.
- Serve as a technical expert regarding transplant patient reimbursement
  - a. Train and coach new Transplant Financial Counseling staff as assigned.
  - b. Act in a lead capacity for departmental goals and initiatives
  - c. Participate as an active member of the various transplant teams

#### 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.

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- 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

Education	Minimum	High school diploma or equivalent
	Preferred	Associate's degree in Business, Finance, Healthcare Administration or related field.
Work Experience	Minimum	One (1) year experience in Health Care Revenue Cycle or insurance
	Preferred	<ul style="list-style-type: none"> <li>• Two (2) years' experience in Healthcare Revenue Cycle or</li> <li>• Previous Transplant experience</li> </ul>
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>• Ability to work in a busy, loud, and demanding environment.</li> <li>• Must independently recognize and evaluate situations for the level of urgency.</li> <li>• Experience in providing a high level of customer service.</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> <li>• Flexible and innovative.</li> <li>• Ability to problem-solve and work independently.</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>• Familiarity with medical terminology and abbreviations.</li> <li>• Proven ability to maintain confidentiality of sensitive information.</li> </ul>

### 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
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				67%-100% of the time
	<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>X</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-10#</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>
<b>Other</b> - list any other physical requirements or bona fide occupational qualifications not indicated above:				

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.