

# UW HEALTH JOB DESCRIPTION

## PATIENT ACCESS REPRESENTATIVE LEAD

Job Code: 440051

FLSA Status: Non-Exempt

Mgt. Approval: S. Carney

Date: November 2022

Department: Rev Cycle - Registration & Admissions

HR Approval: B. Haak

Date: November 2022

### JOB SUMMARY

The Patient Access Representative 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 registration and admissions work units in the clinics and the hospital divisions. This individual is responsible for ensuring the 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 Registration and Admissions. 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.

### MAJOR RESPONSIBILITIES

#### Lead Responsibilities:

- Provide general assistance to the Registration/Admissions 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. Assists 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:

- Obtain and verify patient identity, demographic, and registration information; effectively communicate the purpose for and the requirements of all required patient documents. Must be able to complete and understand the differences between registrations in the ambulatory, inpatient, or Emergency Department setting. Must have a strong understanding of EMTALA rules.
- Bedside follow-up with patients where all necessary information was not obtained at admission, obtain inpatient signatures and complete forms including accident reports for lien preparation and financial statements if needed.
- Change preadmission requests and perform cancellations, when necessary, to assure accuracy of records. Assign the preadmission unit for scheduled admissions.
- "Arrive" patients: Clinic outpatients and ancillary appointments for both scheduled and walk-in patients and promote registration/arrival kiosks to patients and assist them with their use.
- Complete financial registration responsibilities including but not limited to creating guarantor accounts, interpreting eligibility requirements, collecting document signatures, insurance card scanning, taking patient photos, collecting patient payments, and creating financial estimates.
- Complete notifications of urgent admissions to ensure payor contractual requirements are met.
- Counsel patients on prior authorization, referral requirements, insurance networks, covered services, and financial responsibility forms.
- Process discharge and readmission requests for patients transferring between the rehab or psychiatric units and medical units. These requests must be processed real time to prevent delays in patient care.
- Work closely with the Operating Room staff and expedite any requests for changes to admissions, patient class, or attending information.
- Provide patients with information on the financial assistance policy and application process, explaining alternatives and routing patients without clearance to Financial Counseling

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### 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

Education	Minimum	High School Diploma or equivalent
	Preferred	Associate Degree in Business, Finance, Health Info Management, or related field
Work Experience	Minimum	One (1) year of experience in a patient access, healthcare revenue cycle, or clinic operations role
	Preferred	Two (2) 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> <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>

### 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.

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<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 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.	<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.