

## UW HEALTH JOB DESCRIPTION

### PATIENT ACCOUNTS LEAD

Job Code: 440052	FLSA Status: Non-Exempt	Mgt. Approval: D. Thill	Date: Sept. 2023
Department: Rev Cycle – Patient Accounts		HR Approval: B. Haak	Date: Sept. 2023

### JOB SUMMARY

The Patient Accounts Team Lead oversees the daily operations of specific work units within the Patient Accounts Department. The Lead partners closely with Patient Accounts Supervisors to provide leadership coverage and presence to the Patient Accounts 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 Patient Account Team Lead serves as the primary contact for all patient billing inquiries. They are responsible for working with patients, clinicians, third party payors and other parties to resolve outstanding issues and account balances while fulfilling the organization's mission of care and service by providing superior customer service to the patient community. The representative will handle incoming calls, correspondence, as well as face to face communications. They assist patients to ensure swift resolution of outstanding balances by providing information regarding billing practices, policies, and patient billing statements. Job duties include researching accounts to determine appropriate responsibility for account balances, assuring accuracy of billing information, making corrections as necessary, appealing claims to insurance companies, reconciling overpayments, requesting refunds as needed and following-up to facilitate prompt and accurate account resolution.

The Patient Accounts Team Lead is responsible for taking escalated patient calls, The incumbent provides orientation and training to new staff. The employee performs complex patient account follow-up activities; actively participates in quality improvement activities; and assists with special projects, as needed. This senior level employee is expected to identify system and workflow issues and resolve problems with minimum direction. Problems encountered are of moderate to high complexity and require a broad knowledge of the revenue cycle processes from front-end through the back-end.

The Patient Accounts Team Lead 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 serves as a go-to resource to staff. This individual will be responsible for ensuring the effective operations of the day-to-day activities of patient accounts. This person will identify areas for improvements and develop plans for improving the quality of these processes.

*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 Patient Accounts team:
  - Train new staff and provide ongoing training for existing staff
  - Monitor activities performed by Patient Accounts Representatives to make sure that patient accounts are reconciled appropriately and timely
  - Complete quality improvement and productivity activities
  - Answer questions regarding team functions and assist with team direction

#### Core Responsibilities:

- Handle all communication with patients (in person, telephone, MyChart message, e-Mail, and voicemail), in a prompt and courteous manner
- Clearly explain charges, payments, account balance, and account status to patients to ensure first call resolution
- Communicate with Revenue Cycle teams, insurance companies, clinical staff/leadership, and others to resolve problem accounts
- Utilize outbound dialer, to make collections calls to patients on older outstanding balances. Negotiate full payment from patients and as appropriate assists patients in setting up a payment plan
- Provide education to patients on UW Health's financial assistance policy and application process, if needed. Direct patients to the appropriate resources as necessary (e.g. Financial Counseling, Patient Relations)

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- Receive, document, and respond to all patient correspondence in a prompt and courteous manner; accurately document all actions take to reconcile outstanding balances
- Verify patient coverage information and update registration as required
- As needed, assist patient in coordinating appeal processes with their insurance company
- Review self-pay undistributed and credit balance accounts and provide refunds to patients as necessary

### 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 people

**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 Information Management or related field
Work Experience	Minimum	Two (2) years of experience in a healthcare revenue cycle or clinic operations role -or- one (1) year of experience in a healthcare revenue cycle operations role plus one (1) year of prior leadership experience.
	Preferred	<ul style="list-style-type: none"> <li>• Experience with customer service, insurance, finance, or medical office</li> <li>• UW Health Revenue Cycle experience</li> <li>• Epic Experience</li> </ul>
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		
<ul style="list-style-type: none"> <li>• Excellent customer service, interpersonal and organizational skills</li> <li>• Ability to use good judgments in highly emotional and demanding situations</li> <li>• Ability to react to frequent changes in duties and volume of work</li> <li>• Excellent oral and written communication skills</li> <li>• Ability to listen empathetically</li> <li>• Ability to logically and accurately organize details</li> <li>• Ability to manage multiple tasks with ease and efficiency</li> <li>• Self-starter with a willingness to try new ideas</li> <li>• Ability to work independently with minimal supervision and be result oriented</li> <li>• Effective interpersonal skills, including the ability to promote teamwork</li> <li>• Strong problem-solving skills</li> <li>• Excellent computer operating skills (keyboard, mouse)</li> <li>• Ability to use various computer applications including EPIC and MS Office</li> <li>• Basic math skills and knowledge of general accounting principles</li> <li>• Maintains confidentiality of sensitive information</li> <li>• Broad knowledge of health care business office practices and principles</li> <li>• Knowledge of medical and insurance terminology, CPT, ICD coding structures, and billing forms (UB, 1500)</li> <li>• Knowledge of Business Office policies and procedures</li> <li>• Knowledge of local, state and federal healthcare regulations</li> <li>• Knowledge of bankruptcy and collection laws and the Federal Debt Collection Act, and how outside agencies operate preferred</li> </ul>		

### 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.*

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Physical Demand Level		Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 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 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 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>
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.