

UW HEALTH JOB DESCRIPTION

Health Information Access Specialist Lead

Job Code: 440104	FLSA Status: Non-exempt	Mgt. Approval: W. Limp	Date: June 2021
Department: Health Information Management		HR Approval: J. Theisen	Date: June 2021

JOB SUMMARY

The Health Information Access Specialist Lead can work on two distinct teams within the Health Information Management (HIM) department: Release of Information (ROI) or Record Retrieval Management (R2M). Both teams are vital to the patient care experience, but each serves a unique set of customers (internal and external).

Record Retrieval Management (R2M) team members work directly with UW clinics & providers as well as patients and their families to facilitate the retrieval of pertinent medical documents and images from external facilities. By requesting and monitoring the retrieval of protected health information (PHI) from multiple providers and clinics prior to the patient's initial visit that is complete, timely and accurate allows the patient and care team to start treatment right away. Facilitating the record retrieval process in conjunction with the UW clinic(s), not only helps to improve the patient experience, but the valuable work that the R2M team performs also helps to decrease the wait time for patients to schedule their initial appointment.

Release of Information (ROI) team members are primarily responsible for processing STAT requests that impact continuity of care. This position also serves as the electronic health record external access support contact to both internal and external end users providing appropriate support and/or access to information while maintaining the utmost patient confidentiality. The incumbent also manages the advance medical directive process of review and acceptance/rejection, scanning and acknowledging receipt of an advance directive via letter to the patient. This position approves, flags, and scans/indexes all verbal and exchange of information authorizations for UW Health. This includes working with the patient and their families, and internal staff to ensure the document is valid prior to scanning it into the EMR.

In addition to performing normal operations work like other team members, the Lead role is charged with training staff how to best make appropriate independent, on-the-spot decisions, which are typically in response to state statutes and federal regulations. The Lead is responsible for training staff on proper workflows for both teams. Workflows require technical aptitude for use of all platforms as well as aptitude to troubleshoot issues as they arise and report to the appropriate resources as necessary. The workflow may require staff to work with the patient, the patient's family or legal representative, government agency or other provider(s) to ensure accuracy, and timeliness. Both workflows require the incumbent to have professional written and oral communication skills. Training consists of new staff workflow onboarding (3-6 months depending on trainee) as well as continuous process improvement for all staff. The incumbent will prepare and present educational materials to the team during huddles and team meetings. Part of the Lead's responsibility includes quality assurance checks and providing feedback via progress reports.

MAJOR RESPONSIBILITIES

Record Retrieval Management (R2M)

- Work with UW Specialty Clinics to identify pertinent patient information to assist in the Scheduling, Ambulatory Access, and Pre-Visit Planning processes
- Work with the internal HIM and other UW teams to optimize workflows around record gathering and abstraction, streamlining the prior authorization process, and optimizing use of electronic medical records
- Utilize EHR functionalities and Access Database to coordinate record retrieval from external providers
- Upload PHI into the EHR following strict policies and procedures to ensure accurate, complete and timely access
- Work with enterprise imaging to upload radiological images into the PACS system

Release of Information (ROI)

- Follow statutory guidelines and other regulations to independently evaluate and respond appropriately to requests from individuals, families, legal representatives, insurance companies, healthcare providers or government agencies for the release of patient health information
- Review, access for compliance, prioritize, process/reject requests for ROI for all of UW Health, determining the most efficient mode of delivery as to not negatively impact patient care, payment of claims, or accommodating Federal regulatory mandates, as well as to avoid any potential breaches
- Review Advance medical directives and legal documents, assess for compliance, approve/accept or reject as well as enter appropriate system FYI flags to alert clinicians of patient directives and trigger banner alerts throughout the EHR and scan applicable documents into the electronic health record

UW HEALTH JOB DESCRIPTION

- Review, assess for compliance, approve/reject and scan of all verbal and exchange of information authorizations and update system FYI flags to alert clinicians of patient directives re: sharing of information (and thus avoiding potential for breach of information)
- Receive, assess for compliance, process/reject patient requests for MyChart activation codes –working with patients/legally authorized representative to complete required paperwork

Both R2M and ROI

- Work directly with staff to train in current workflows, policies and procedures
- Work with the HIM Manager to update and maintain training materials
- Utilize technology for in person and remote training
- Attend weekly meetings with HIM Manager to provide feedback and plan upcoming training events
- Perform Quality Assurance checks on trainee work and provide timely feedback to the trainee and the HIM Manager on trainee progress
- Provide telephone support from both internal and external callers (e.g., staff, doctors, patients, insurance companies, attorneys, etc.)
- Ensure privacy and security of all protected health information accessed and released is maintained at all times
- Maintain accurate and complete databases to account for all disclosures
- Maintain accurate and complete databases to ensure efficiencies
- Process requests for timely and accurate release of information

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 HIM, HIT, or other relevant discipline
Work Experience	Minimum	One (1) year experience performing release of information activities, patient access and/or scheduling and registration or direct patient care experience
	Preferred	Three (3) years prior experience performing release of information activities, patient access and/or scheduling and registration or direct patient care experience (Electronic setting preferred).
Licenses & Certifications	Minimum	
	Preferred	RHIT, RHIA, CAHIMS, CPHIMS, CRIS, CNA, or EPIC Certification
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> • Knowledge of R2M and/or ROI workflows • Analytical skills, • Familiarity with the UW Health System and the UW partner organizations locally and regionally, • Attention to details • Professional written and verbal communication skills directed to a variety of customers • Excellent internal and external customer service skills with the ability to remain calm, be patient and respond professionally to all requests • Proven organization and project planning skills

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 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.	Up to 10#	Negligible	Negligible

UW HEALTH JOB DESCRIPTION

	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-10#
	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#
Other - 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.