

UW HEALTH JOB DESCRIPTION

PATIENT ACCESS REPRESENTATIVE - AMBULATORY

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|---|-------------------------|--------------------------|---------------------|
| Job Code: 440048 | 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 Ambulatory enters and verifies demographic and insurance information, identifies and collects patient financial obligations, and arrives the patient. The individual is ultimately responsible for assisting patients and families via phone or in person and works closely with clinic and business office representatives. This position is customer service driven and the individual must have the ability to effectively promote a positive patient and family experience, exhibit empathy, engage in compassionate collections, and demonstrate strong communication skills.

MAJOR RESPONSIBILITIES

Core Responsibilities:

- Obtain and verify patient identity, demographic and registration information; effectively communicate the purpose for and the requirements of all required patient documents
- "Arrive" patients: register scheduled and walk-in clinic outpatients and direct patients to scheduled care location or clinic appointment
- Schedule patients for walk-in visits in departments such as lab and urgent care.
- Complete financial registration responsibilities including but not limited to creating guarantor accounts, interpreting eligibility requirements, collecting document signatures, insurance card scanning, taking patient photos, and creating financial estimates
- Counsel patients on prior authorization, referral requirements, insurance networks, and financial responsibility forms
- Collect patient financial obligations
- Promote registration/arrival kiosks to patients and assist them with their use.
- Provide patients with information on the financial assistance policy and application process, explaining alternatives and routing patients without clearance to Financial Counseling
- Complete the health screening questions with patients and visitors

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

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| Education | Minimum | High School Diploma or Equivalent |
| | Preferred | Associate degree in Business, Finance, Health Information Management or related field |
| Work Experience | Minimum | One (1) year of experience in a customer service-related field |
| | Preferred | One (1) year of experience in a healthcare, call center, business, financial or insurance related field |
| Licenses & Certifications | Minimum | |
| | Preferred | |
| Required Skills, Knowledge, and Abilities | | <ul style="list-style-type: none"> • Ability to work in a busy, loud, and demanding environment. • Must independently recognize and evaluate situations for the level of urgency. • Experience in providing a high level of customer service. • 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. |

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| | <ul style="list-style-type: none"> • Ability to multi-task and prioritize tasks. • Displays an aptitude and willingness to learn new responsibilities. • Willingly accepts feedback. • Flexible and innovative. • Ability to problem-solve and work independently. • Displays a professional appearance. • Dependable and reliable in achieving goals. • Experience operating office machines such as personal computers, fax machines, photocopier, and document scanners. • Familiarity with 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,

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|--|-----------------------------|--|------------------------------|
| | 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 |
|--|-------------------------------------|---|---|
| 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 |
| X 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.