

UW HEALTH JOB DESCRIPTION

WELCOME CENTER AGENT LEAD

Job Code: 19141

FLSA Status: Non-Exempt

Mgt. Approval: K. Justinger Date: December 2018

HR Approval: Date:

JOB SUMMARY

Under the direction of the Welcome Center Supervisor, the Welcome Center Agent Lead performs all functions expected of Welcome Center Agents and additionally performs advanced work to support needs of the agent staff. Agents are responsible for first call resolution of needs for UW Health customers. The Agent determines needs of the caller, assists in connecting to appropriate resources, and providing information to resolve less complex issues. If the customer requires additional intervention, the Agent determines the next course of action including forwarding to or consulting with the appropriate UW Health personnel or community resource. The Agent requires extensive knowledge of the entire UW Health system, community resources, and changes in UW Health policies/ procedures/ initiatives/services. The Agent de-escalates customers, provides excellent customer service, and responds to callers' questions relating to sensitive concerns. The Agent initiates the Welcome Center process to provide smooth transitions and access to health care for new or displaced patients.

The Welcome Center Agent Team Lead trains and mentors new staff, answers workflow questions from department staff, serves as a point of escalation for unusual or complex situations, and will support special projects needed in the department. The Team Lead also monitors daily phone queues to ensure that all staff are working optimally and efficiently.

MAJOR RESPONSIBILITIES

1. Respond to incoming calls from a wide variety of patients, staff, and others, and provide assistance, redirection, and support for resolution of questions or needs. This may require significant skill in interviewing, researching, and collaboration.
2. Respond to website contacts/feedback in a professional, courteous, confidential and timely manner.
3. Provide on-boarding for Welcome Center eligible patients. This includes PCP selection, determination of additional needs, accurate documentation, and collaboration with other staff.
4. Serve as an expert resource for system navigation for patients, staff or other callers.
5. Respond to requests and coordinate with clinics, outside organizations, internal departments (eg medical management) and employees to assist new patients.
6. Initiate and follow-up on standard and urgent medical record requests for new patients.
7. Complete tasks related to data collection/quality monitoring.
8. Schedule initial appointments for designated new patients as needed.
9. Aid Supervisor in the development and revision of work standards applicable to areas of expertise.
10. Train and mentor new staff.
11. Monitor phone queues and support staff in providing efficient, effective responses.
12. Provide support/resource for department staff in complex situations.
13. Support Welcome Center programs/projects and general Appointment Center initiatives as needed.
14. Other duties as assigned

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 or Bachelor's degree in Business Administration, Healthcare, or other related field |
| Work Experience | Minimum | One (1) year of experience working in a registration, scheduling or call center position |
| | Preferred | <ul style="list-style-type: none"> • Previous experience working in scheduling, registration, or a call center • Previous experience using Epic Cadence and Prelude software |
| Licenses & Certifications | Minimum | |
| | Preferred | |
| Required Skills, Knowledge, and Abilities | | <ul style="list-style-type: none"> • Demonstrated leadership skills. • Excellent verbal, listening, and written communication skills. • Demonstrated ability to provide excellent, compassionate customer service. • Ability to operate a computer. • Efficient and accurate typing skills. • Knowledge of medical terminology and abbreviations preferred. • Knowledge of third party payors and billing requirements preferred. |

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- Ability to think independently and demonstrate effective problem-solving skills.
- Ability to prioritize and complete required tasks within established time schedules.
- Ability to work in a team environment and to collaborate with a variety of personnel.
- Ability to keep information confidential.
- Ability to work in a fast-paced environment and handle stressful situations.
- Excellent organizational skills.
- Excellent customer service skills and ability to manage upset customers.
- Computer software; including word processing, spreadsheet and presentation applications (Microsoft Access, Word, PowerPoint, Visio and Excel).

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 FUNCTION

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 |
|--|--|-------------------------------------|---|---|
| X | 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 |
| | 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# |
| List any other physical requirements or bona fide occupational qualifications: | | | | |