

## UW HEALTH JOB DESCRIPTION

### PATIENT RESOURCES COORDINATOR

<b>Job Code: 19130</b>	<b>FLSA Status: Exempt</b>	<b>Mgt. Approval:</b>	<b>Date:</b>
<b>Department : Patient Resources</b>		<b>HR Approval:</b>	<b>Date: July 2013</b>

#### JOB SUMMARY

Under the supervision of the Patient- Family Connections Director, the Patient Resources Coordinator coordinates programs for addressing and tracking patient/family feedback, social service cases, assists staff and physicians with difficult patient situations, and implements programs to reduce barriers for patients to receive health care. This position provides direction or manages the most complicated and sensitive issues for UW Health, Outreach, SMPH Department Managed sites, etc. This includes quality of care/service investigations; interviewing patients/staff/managers/physicians, etc, evaluating patient feedback, analyzing chart documentation, and deciding on the most appropriate response to the patient in collaboration with medical leadership, managers, legal, etc. This position serves as the contact for the most complex and high risk cases, serves as the risk manager for physicians/staff. S/he identifies risk/service/care issues and trends; notifying the appropriate leadership to implement quality improvement. The Coordinator is responsible for interpreting regulatory requirements in managing Mental Health, Alleged Discrimination, etc complaints and maintains work standards relating to the requirements. She is the primary contact for these cases and/or provides guidance to the representatives managing these cases.

This position assesses patient social service needs, including suicidal and homicidal assessments. Extensive knowledge in government programs, community resources, UW Health initiatives, policies, and procedures is required. The Coordinator is the primary contact for the most complex and sensitive cases utilizing vast knowledge of resources and interviewing skills to resolve problems.

The Coordinator responds to threatening and disruptive patient situations, creates safety plans in collaboration with other departments, and manages NFS (no further service). This role provides training, guidance, and mentors staff and physicians on management of complex patient issues.

This position trains and supervises Patient Resources Representatives.

#### MAJOR RESPONSIBILITIES

1. Oversee various special projects as designated by the Department Directors, identified as needed by clinics/physicians.
2. Participate and/or take lead on UW Health collaborative initiatives related to patient feedback (example: PFCC Committees).
3. Create, maintain and follow policies in place relating to feedback and social issues (example: Abuse Policies, suicidal patients).
4. Complete Performance Reviews for direct reports in Patient Resources.
5. Supervise and oversee day to day staff and their duties/projects.
6. Develop staff including cross-training and professional growth that coincides with organizational and department standards.
7. Create a climate that produces positive staff morale and productivity.
8. Facilitate cases consults with representatives; reviewing cases, providing direction as to how to manage the cases.
9. Oversee delegation of work to the appropriate work force management.
10. Report daily/monthly on representative case volume to aid case distribution.
11. Run monthly reports on open cases and consult with Representatives as needed regarding volume and adhering to the guidelines for open cases.
12. Respond to patients when higher level supervisory involvement is requested by patient or staff member.
13. Serve as the central clearing house for resource information, consultation, and direction on complaint, social service, NFS, Staff Assist and Risk cases for patients, staff, managers, and physicians for UW Health, DFM clinics and designated areas.
14. Set clear expectations and monitor delegated cases.
15. Collaborate with others within UW Health who provides similar service. Provide consultation and direction as they implement systems already in place in Patient Resources.
16. Establish strong partnerships with other organization such as Meriter to facilitate proper management of complaints regarding UW Health physicians at their location.
17. Network patients and their family members to available community resources.
18. Document all cases in CRM (Customer Relationship Manager) and HealthLink as needed.
19. Implement systems to ensure staff cases are appropriately documented in Healthlink and CRM.
20. Generate and analyze reports regarding case type and volume as requested. Provide reports to appropriate

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- leadership. Assess trends and recommend process improvement to appropriate leaders as needed.
21. Assess eligibility of uninsured patients for federal, state and community programs to assist funding of medical care and assist with processing paperwork required for governmental/community programs and support with appeals process as needed.
  22. Function as liaison to other agencies; Dane County and the State of Wisconsin on programs as well as other agencies such as MTM.
  23. Foster strong working relationships with professionals outside of UW Health and represent UW Health at task force meetings and community outreach meetings (ie, Healthwatch, WI MA Transportation groups, etc).
  24. Establish collaborative relationships with clinic and site managers, and other professionals within UW Health.
  25. Serve as a consultant to Human Resources on cases in which employees have social service needs.
  26. Serve as an emergency responder for the panic pager used for threatening patients at the AOB.
  27. Assist with community outreach, providing educational opportunities to the public (ie, MATC students).
  28. Streamline Patient Resources and social service functions within the context of UW Health's long-term goals.
  29. Monitor regulatory requirements in managing Mental Health, Alleged Discrimination, etc complaint cases. Trained Clients Rights Specialist. Adapt and create policies and work standards to abide by federal and state regulations.
  30. Conduct visits to clinics to enhance awareness of Patient Resources services.
  31. Develop and provide training to clinics/staff/physicians about pertinent topics (example: Suicide Training)
  32. Analyze staff, physician, patient satisfaction information as it relates to areas of responsibility and educate staff about services. Develop and implement changes needed to improve Pt. Resources services and improve satisfaction.
  33. Oversee the Cab Program including program review, forecasting, implementing necessary changes, and managing the budget.
  34. Assess for changes in the state cab program, maintain Pt. Resources processes and communicate changes to all in the organization.
  35. Participate in appropriate ongoing education.
  36. Develop and maintain HealthLink documentation guidelines as well as pertinent work standards and work flows
  37. Provide resource information, consulting, and direction on available social service resources to patients, staff, managers and physicians.
  38. Network patients and their families to community resources.
  39. Receive record, track, investigate, and resolve patient complaints and concerns in a timely, confidential manner. Provide follow-up to patients.
  40. Collaborate with Unity sales/customer service staff and the Patient Resources supervisor on system navigation issues for new groups.
  41. Maintain and follow policies in place to manage complaints originated through the HMOs.
  42. Manage Meriter in-patient complaints when involving UW Health managed physicians as requested.
  43. Develop, maintain, and abide by FDA requirements when handling Mammography complaints involving possible rights violations.
  44. Work closely with physicians, supervisors, coordinators, managers, legal services, and medical administration to resolve patient complaints.
  45. Educate patients and staff when appropriate regarding UW Health policies and procedures.
  46. Coordinate and provide guidance on the resolution of potential medical malpractice and physical liability cases. Research and educate staff on legal issues as required.
  47. Identify policies/practices having potential liability issues and bring them to the attention of appropriate personnel.
  48. Serve as a back up for Patient Resources Training Programs (i.e., NEO, Dealing with Difficult Interpersonal Situations, NPO, NP/PA).
  49. Present on pertinent topics at meetings such as clinic operations as needed.
  50. Communicate with LEP (limited English proficient) patients via interpreter services or TDD machine as needed.
  51. Maintain and develop and training materials for NEO, NPO, Physicians. Provide training and orientation to new employees and physicians.
  52. Manage cases relating to difficult patient situations. Help to diffuse difficult/aggressive patients when possible. Oversee Patient Resources Reps management of cases and delegate and oversee management of PSN cases.
  53. Coordinate NFS by collaborating with physicians, medical administration and legal as needed on No Further Service cases.
  54. Guide managers, directors, supervisors, physicians and/or staff in the event of a critical incident and contact patient as needed.
  55. Work closely with the Director of Health Information and HIPAA Privacy Officer to ensure confidentiality. Serve as a patient contact for HIPAA questions.
  56. Oversee and/or process time cards in Kronos.
  57. Orient new Patient Resources staff as needed.
  58. Attend clinic operations and other meetings as needed.

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59. Preserve organizational resources.  
 60. Use systems thinking concepts.  
 61. Adhere to organizational service and performance standards  
 62. Provide excellent customer service and patient and family centered care  
 63. Other duties as assigned.

**ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.**

### JOB REQUIREMENTS

Education	Minimum	Bachelor's degree in psychology, social work, counseling, or other behavioral science related degree
	Preferred	Master's degree
Work Experience	Minimum	<ul style="list-style-type: none"> <li>• 2 - 3 years related experience, preferably in a medical setting</li> <li>• 2-3 years supervisory experience</li> </ul>
	Preferred	
Licenses & Certifications	Minimum	
	Preferred	
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>• Training in organizational behavior, human relations, conflict resolution, and mental health issues</li> <li>• Supervisory experience preferred</li> <li>• Experience in health care/social service facility in patient/client contact, teaching or public relations role</li> <li>• Knowledge of local, state, and federal community resources available to patients</li> <li>• Administrative experience and excellent organizational skills</li> <li>• Background in staff development or human relations</li> <li>• Superior verbal and written communications, interviewing skills, and the ability to work with a diverse population</li> <li>• Experience with quantitative research, microcomputers and databases</li> <li>• Familiarity with social/human service practices, confidentiality, and risk/malpractice issues within health care settings</li> <li>• Excellent customer service skills</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.

### 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
<b>Sedentary:</b> 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	<b>Up to 10#</b>	<b>Negligible</b>	<b>Negligible</b>

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	and other sedentary criteria are met.			
	<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-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.