

UW HEALTH JOB DESCRIPTION

Surgical Case Scheduling Education Specialist

Job Code: 310056	FLSA Status: Exempt	Mgt. Approval: Eric Williams	Date: August 2023
Department: Clinics - Surgical Case Scheduling	HR Approval: J. McCoy	Date: August 2023	

JOB SUMMARY

The Surgical Case Scheduling Education Specialist is responsible for training new and existing staff, assessing, planning, developing, facilitating, evaluating, and revising educational documents related to surgical case scheduling workflows to ensure department team members have the skills to deliver remarkable service to UW patients and their families. The Surgical Case Scheduling Education Specialist will work closely with the Surgical Case Scheduling Manager and Supervisors, Ambulatory Operations, Ambulatory Access Operations, Surgical Services Operations, Revenue Cycle, Ambulatory Optimization, and IS teams to create and maintain workflow documentation for the department and clinics. This position may deliver training content or may assist and support operational leaders in the delivery of training content.

MAJOR RESPONSIBILITIES

- Work with users at various levels of the organization to analyze and prioritize education needs.
- Learn the workflows, business processes, value streams, and key challenges for assigned areas.
- Participate in cross-functional teams, leverage knowledge and skills with a variety of applications, tools, and technologies, and supports successful initiatives to ensure system and partner priorities are met.
- Provide education, optimization, and adoption strategies, services, and solutions for new technologies and innovations for UW Health and respective partners.
- Define small to medium project objectives and ensure deliverables are met within set timelines.
- Develop and maintain trusted advisor relationships with business, clinical, and operations leaders that include guidance for optimizing use of technology capabilities and deliverables including liaison between stakeholders and vendor representatives.
- Define opportunities to improve system and platform reliability and automate repetitive processes.
- Develop surgical case scheduling specific training programs to include curriculum, courses, materials, onboarding checklists, and proficiency checklists related to scheduling workflows that meet the educational needs of adult learners.
- Participate in strategic planning, ad hoc projects, and educational activities as assigned for the department.
- Create and maintain education and optimization aids such as lesson plans, practice scenarios, eLearning materials, evaluation forms, visual aids, and knowledge retention learnings.
- Develop document control systems, and act as distribution gatekeepers of education documents.
- Remain current on changes to department workflows and functionality, updating materials and communicating with other departments when appropriate.
- Perform continual assessment of workflow execution and quality assurance outcomes to enhance and supplement training program offerings and content. This includes direct observation, report development, data analysis, and collaboration with the Quality Assurance team.
- Collaborate with Education, Support, and Optimization educators to align technical and operational training curriculum.
- Provide reports to leadership, staff and other stakeholders as required related to new and ongoing educational programs and individual proficiency.
- Perform testing of applications prior to implementation of new educational programs and workflow changes.
- Gather fresh education, optimization and development information and adult learning techniques through web-based research and participation in appropriate user group meetings.
- Identify and share opportunities to optimize Health Link to maintain alignment with scheduling best practices, and to decrease the onboarding time for new hires.
- Lead and coordinate education projects directly related to scheduling or other large projects as designated by surgical case scheduling management.

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

JOB REQUIREMENTS

Education	Minimum	Bachelor's degree in Business Administration, Healthcare, or related field. Four (4) years of relevant experience may be considered in lieu of a degree, in addition to the required experience below.
	Preferred	

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Work Experience	Minimum	Two (2) years of customer service, training, or other relevant experience.
	Preferred	Three (3) years of experience in customer service, training, or other relevant experience in a healthcare setting. Experience teaching adult learners. Experience with eLearning software.
Licenses & Certifications	Minimum	
	Preferred	Certification or Proficiency in Epic Cadence.
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> • Strong needs assessment and instructional design/curriculum development experience. • Proven ability in developing learning programs and curriculum for a spectrum of delivery channels. • Knowledge and experience with learning/talent development solutions. • Consulting and relationship building skills. • Solid experience in instructional design and needs assessment. • Solid presentation and facilitation skills with thorough knowledge in principles of adult learning. • Ability to research issues and make effective recommendations using critical thinking skills. • Effective project management skills with ability to handle multiple tasks simultaneously while managing deadlines. • Effective analytical ability and sound judgment to assess needs and troubleshoot performance or process issues. • Strong and effective communicator, both verbally and in writing. • Strong orientation to customer service and demonstrated customer service skills. • Ability to work with diverse populations. • Track record demonstrating ability to function independently and as a team member, and consistently deliver quality outcomes. • Ability to maintain confidentiality of all information encountered. • Knowledge of medical terminology. • Proficiency using the following software is required: <ul style="list-style-type: none"> ○ MS Outlook ○ MS Word ○ MS PowerPoint ○ MS Excel • Knowledge of some of the following software and applications: <ul style="list-style-type: none"> ○ Learning Management Systems ○ Webinar/Web-conferencing software • Ability to travel to and work from UW Health locations in the Madison area.

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#

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Other - list any other physical requirements or bona fide occupational qualifications not indicated above:	
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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.