



JOB TITLE: Lead Patient Access Representative

DEPARTMENT: Medical

REPORTS TO: Patient Access Manager

Statement of Duties

Duffy Health Center is a patient-centered medical home, and every role requires functioning effectively using a team-based approach. The Lead Patient Access Representative (PAR) is responsible for providing guidance and peer support in the daily workflow of the Patient Access Representative team. The Lead PAR performs administrative and clerical duties for Duffy Health Center. Work includes responding to requests for information and assistance from patients and providers, scheduling appointments, verifying information, processing referrals, collecting and recording data, maintaining and updating records and files, and facilitating patient care. This position is deemed essential* in the DHC Emergency Operations Plan.

Position Functions

The statements contained in this job description reflect general details, as necessary, to describe the principal functions of this job, the level of knowledge and skill typically required, and the scope of responsibility. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties, as assigned, including work in other functional areas to cover absences or provide relief, to equalize peak work periods or otherwise to balance the workload.

Lead duties

1. Provide support to fellow Patient Access Representatives through the oversight of daily operations, including delegation of daily tasks such as answering phones, assisting patients with check ins, and scheduling.
2. Manage adherence to front desk workflows, i.e., check-in, check-out, scheduling, etc.
3. Assist Patient Access Manager in handling/arranging changes in coverage for department call-ins.
4. Assist Patient Access Manager, with recruitment of PARs by reviewing resumes and attending interviews with both Patient Access Manager and potential candidates as needed.
5. Identify and raise any Patient Access Representative performance issues with Patient Access Manager for resolution.



6. Assist Patient Access Manager in assuring that special departmental projects are completed accurately and within the given timelines.
7. Provide input to Patient Access Manager where the need for training/follow up is needed.
8. Leads training of all new Patient Access Representative hires under the direction of the Patient Access Manager.

Patient Access Representative duties

1. Interacts with new and current patients and clients to facilitate care at Duffy Health Center: makes appointments and checks clients in and out, verifies current insurance, gathers information from patients, obtains records necessary from outside providers, creates records required for visits, and explains health center procedures to new patients; coordinates with behavioral health and case management for client arrival.
2. Coordinates with staff prior to opening clinic for clinic readiness.
3. Works closely with providers all during the day to provide follow up for patients regarding appointments, prescriptions, forms, and/or test results; may prepare medical encounter forms for patient charts.
4. Manages multiple phone lines efficiently and responds appropriately to emergencies and non-emergency phone calls; provides information, assistance, and referrals.
5. Maintains accurate records by continuously updating patient personal information and insurance verification and refers any insurance questions or issues to Benefit Counselors for follow-up.
6. Coordinates all walk-in patients by either attempting to schedule for an appointment or working with clinic staff to schedule to see a triage nurse.
7. Responsible for collecting and recording co-payments for patient visits.
8. May serve as Portuguese/Spanish interpreter, as needed.
9. Maintains a steady flow of appointments for patients and providers.



10. Prepares reports and requested correspondence by collecting data and inputting information into spreadsheets and databases.
11. May serve as fax server for the organization to send and receive faxes, downloads and scans; distributes information to providers or other staff as needed.
12. Maintains confidentiality and confidential files and information for department.
13. Receives and delivers mail to employees.
14. Works on special projects or other duties as assigned.

Recommended Minimum Qualifications

Minimum Education and Experience

A candidate for this position must have a High School diploma or equivalent, with advanced training in Medical Terminology preferred, and at least two (2) years of experience in office administration; or any equivalent combination of education and experience.

Requirements under the DHC Emergency Operations Plan

During a declared Emergency, staff deemed as Essential Personnel are expected to work onsite at Duffy Health Center and Non-Essential Personnel are expected to work remotely. This position is Non-Essential and therefore this position may be expected to work remotely' during a declared emergency.

Knowledge, Skills, and Abilities

A candidate for this position should have the following:

Knowledge of:

- Medical office practices, procedures, and medical terminology
- Electronic Medical Records systems
- Intermediate knowledge of state and federally sponsored insurance programs including MassHealth, Medicare and Health Safety Net.
- Use of office equipment and computer programs
- Company and departmental policies and procedures
- HIPAA regulations



Skill in:

- Written and verbal communication
- Interacting effectively and appropriately with patients and clients
- Handling multiple priorities simultaneously in a timely manner
- Collecting and recording information effectively
- Computer programs: Excel, Word and electronic medical records. Accurate maintenance of records and files

Ability to:

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- Maintain confidentiality of information
- Plan and prioritize work, handle multiple priorities simultaneously in a timely manner
- Be flexible with clients, providers, visitors and work schedules
- Work independently and with a team
- Handle difficult situations effectively and professionally
- Meet deadlines
- Commit to the philosophy and mission of Duffy Health Center which serves the homeless and at-risk population, and to the team-based approach as part of PCMH.

Accountability

The nature of work means that errors can be easily detected, usually by the employee. Consequences of errors, missed deadlines or poor judgment may result in minor confusion, involving minimal time and expense for correction.

Judgment

Well defined or detailed rules, instructions and procedures cover all aspects of work. Judgment involves choosing the appropriate practices, procedures, regulations, or guidelines to apply in each case.

Complexity

The work consists of simple, routine, or repetitive tasks and/or operations with few variations in established procedures.

Supervision Required

Under general supervision, the employee is familiar with the work routine and uses initiative in carrying out recurring assignments independently with specific instruction. The supervisor provides additional, specific instruction for new, difficult, or unusual assignments, including suggested work methods. The employee is expected to recognize instances which are out of the ordinary and which do not fall within existing instructions; the employee is then expected



to seek advice and further instructions. Reviews and checks of the employee's work are applied to an extent sufficient to keep the supervisor aware of progress, and to insure that completed work and methods used are technically accurate and that instructions are being followed. In many cases, the work is self-checking, for example, requiring accounts to balance before proceeding.

Nature and Purpose of Contacts

Relationships with co-workers and the general patient population involving frequent explanation, discussion or interpretation of practices, procedures, regulations, or guidelines in order to render service, plan, or coordinate work efforts, or resolve operating problems. Other regular contacts are with patient/service recipients and employees of outside organizations such as vendors, banks and/or developers/contractors. More than ordinary courtesy, tact and diplomacy may be required to resolve complaints or deal with hostile, uncooperative, or uninformed persons.

Work Environment

The work environment involves everyday discomforts typical of offices, with occasional exposure to outside elements. Noise or physical surroundings may be distracting, but conditions are generally not unpleasant.

Physical Demands

Little or no physical demands are required to perform the work. Work effort principally involves sitting to perform work tasks, with intermittent periods of stooping, walking, and standing. There may also be some occasional lifting of objects (up to 30lbs.).

Motor Skills

Duties are largely mental rather than physical, but the job may occasionally require minimal motor skills for activities such as moving objects, computer and/or most other office equipment, typing, filing, sorting, or operating a motor vehicle.

Occupational Risk

Duties of the job present little potential for injury. Risk exposure is similar to that found in typical office settings.

Confidentiality

Has access to some confidential information obtained during performance of regular position responsibilities, where the effect of any disclosure would probably be negligible or where the full significance of the overall confidential matter would not be apparent in the work performed.



Essential*

*Employees designated as “essential,” a standard Incident Command term used in Emergency Management, typically work on-site to provide direct clinical care or management of such.

Non-essential*

*Employees designated as “non-essential,” a standard Incident Command term used in Emergency Management, typically work off-site remotely to provide either clinical or administrative support to clinical operations.