



JOB DESCRIPTION

POSITION TITLE: Appointment Coordinator

POSITION NO: 23

JOB SUMMARY

The Appointment Coordinator serves as an initial contact for patients and customers, in-person and via telephone, and assists them in a manner consistent with Marshfield Clinic Health Systems' customer service standards. The Appointment Coordinator assesses needs of the patients or customers to determine appropriate scheduling with health care providers within a time and sequence acceptable to the patient and customer's needs and Clinic policy.

ESSENTIAL JOB FUNCTIONS

1. Operates computer and phone system to appropriately and accurately schedule, change, cancel, coordinate, and confirm appointments including ancillary tests and procedures for patients and customers.
2. Screens all incoming phone calls to the department and determines disposition.
3. Schedules and instructs patients on preparations for tests and procedures.
4. Sends letters with appropriate forms, questionnaires, and instructions to patients to educate or receive feedback about their appointment and or procedures.
5. Receives, processes, and files letters and forms from patients and referral sources.
6. Verifies and updates patients' insurance and demographic information.
7. Maintains and updates provider schedules.
8. Operates a fax machine, photocopier and/or printer effectively to communicate patient information.
9. Requests and processes co-payments from patients.
10. Regular attendance is required in order to carry out the essential functions of the position.
11. Reviews and meets ongoing competency requirements of the role to maintain the skills, knowledge and abilities to perform, within scope, role specific functions.

ADDITIONAL DUTIES

1. Monitors, orders and delivers/stores supplies.
2. Performs receptionist duties.
3. Other duties as assigned.

JOB QUALIFICATIONS

EDUCATION

For positions requiring education beyond a high school diploma or equivalent, educational qualifications must be from an institution whose accreditation is recognized by the Council for Higher Education and Accreditation.

Minimum Required: High School diploma or equivalent.

Preferred/Optional: Completion of a Medical Terminology course. Graduate of a vocational technical Health Unit Coordinator Program, Medical Office Specialist, Medical Secretary.

EXPERIENCE

Minimum Required: Excellent written and verbal communication skills. Keyboard, computer, and telephone proficiency.

Preferred/Optional: Six months' previous experience in a healthcare facility to include direct patient contact or previous customer service experience.

CERTIFICATIONS/LICENSES

The following licensure(s), certification(s), registration(s), etc., are required for this position. Licenses with restrictions are subject to review to determine if restrictions are substantially related to the position.

Minimum Required: None

Preferred/Optional: None

PATIENT POPULATIONS SERVED

Individuals hired are expected to serve patients of different ages, backgrounds, etc. When performing the essential functions of the role, the individual must identify the patient age group to be served and apply the appropriate care based on the patient's age and background. The hiring manager is responsible for communicating the patient population generally encountered in the role and is responsible for ensuring the appropriate cultural, age and related training needed to serve the patient populations.

Check appropriate patient age group(s) served or select "Not Applicable"						
<input type="checkbox"/> Infant	<input type="checkbox"/> Toddler	<input type="checkbox"/> Child	<input type="checkbox"/> Adolescent	<input type="checkbox"/> Adult	<input type="checkbox"/> Older Adult	<input checked="" type="checkbox"/> Not Applicable

EXCLUSION FROM FEDERAL PROGRAMS

Employee may not at any time have been or be excluded from participation in any federally funded program, including Medicare and Medicaid. This is a condition of employment. Employee must immediately notify his/her manager or the Clinic's Compliance Officer if he/she is threatened with exclusion or becomes excluded from any federally funded program.

ORGANIZATIONAL COMPETENCIES

- Patient Centered
- Trust
- Teamwork
- Excellence
- Affordability

SPECIAL FACTORS				
Expected Travel and Shift Factors of the Role	Expected Frequency Individual Will Be Requested of Travel and Shift Factors in the Role			
	Frequently Required	Occasionally Required	Seldom Required	Unlikely
Day travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overnight travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
On-call shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Holiday shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>All employees' hours are scheduled according to the needs of the department. Occasional changes to Scheduled hours may be necessary when required by workload or departmental deadlines. May require additional hours based on workload, low staffing or emergency situations.</i>				

PHYSICAL DEMANDS					
Expected Physical Demands of the Role	Expected Frequency Individual Will Perform the Physical Demands in the Role				
	Continuously (67 – 100%) <i>Greater than 5 hours of 8 hour work day</i>	Frequently (34 – 66%) <i>2 ½ to 5 hours of 8 hour work day</i>	Occasionally (11 – 33%) <i>50 minutes to 2 ½ hours of 8 hour work day</i>	Seldom (0 – 10%) <i>Less than 50 minutes of 8 hour work day</i>	Not Present
Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Climb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Grasp	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lift and carry 10 pounds or less for a short distance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lift and carry less than 35 pounds for a short distance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lift greater than 35 pounds utilizing mechanical systems or with additional personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pivot waist and neck	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push and pull 50 pounds or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Push and pull greater than 50 pounds utilizing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

mechanical systems or with additional personnel					
Reach less than 5 feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reach higher than 5 feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sit with back support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sit without back support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Squat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stand Unsupported	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrist flexion/extension	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>All employees are required to utilize proper body mechanics, lifting and moving techniques and/or request assistance from additional staff before attempting to lift any weight outside of their physical capabilities and/or provider ordered restrictions. Actual weight(s) of individuals or items to be lifted vary substantially and must be carefully assessed by staff before attempting a lift to minimize the risk of employee injuries and ensure patient safety.</i>					
Hearing and Vision			Requirement	Not a Requirement	
Normal vision with/without correction			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Color vision			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Normal hearing with/without correction			<input checked="" type="checkbox"/>	<input type="checkbox"/>	

ENVIRONMENTAL FACTORS					
Expected Environmental Factors of the Role	Expected Frequency Individual Will Be Exposed to Environmental Factors Demands in the Role				
	Continuously (67 – 100%) <i>Greater than 5 hours of 8 hour work day</i>	Frequently (34 – 66%) <i>2 ½ to 5 hours of 8 hour work day</i>	Occasionally (11 – 33%) <i>50 minutes to 2 ½ hours of 8 hour work day</i>	Seldom (0 – 10%) <i>Less than 50 minutes of 8 hour work day</i>	Not Present
Works indoors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works outdoors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Uses a computer monitor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works alone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works with others	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works at unprotected heights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Works with explosives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to biological agents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to dust, fumes, smoke, gases, odors, mists or other irritating particles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to excessive noises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to extreme hot or cold temperature and/or	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

changes in humidity					
Exposure to radiation or electrical energy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to slippery or uneven walking surfaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to solvents, grease or oils	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to toxic or caustic chemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exposure to vibration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Around moving machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Operates moving machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other special conditions:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>All employees are required to appropriately dress is based on the area the position resides in and must follow the Marshfield Clinic Health System Personal Appearance (Dress Code) policy and other applicable departmental policies.</i>					

The above statements are intended to describe the general nature and level of work being performed by the person assigned to this position. Essential job functions are intended to describe those functions that are essential to the performance of this job, and additional job functions include those that are considered incidental or secondary to the overall purpose of this job.

This job description does not state or imply that the above are the only duties and responsibilities assigned to this position. Employees holding this position will be required to perform any other job-related duties as requested by management. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

CREATED BY: Human Resources

DATE MODIFIED: 10/19/2018