 **Lead Patient Services Associate Standard Job Description**

**Classification Title:** Lead Patient Services Associate

**FLSA Exemption Status:** Non-exempt

**Pay Grade:** 8

**Job Description Summary:**

The Lead Patient Services Associate, under general supervision, serves as team lead and primary team contact for assigned area and provides training for team members. Organizes and distributes personnel work schedules for assigned area, collaborating with other team leads to ensure coverage of front desk areas. Provides exemplary customer service to internal and external customers and ensures continuity and consistency of patient services across multiple areas.

**Essential Duties and Tasks:**

**60%: Lead Patient Service Associate**

* Provides exemplary customer service to internal and external customers and ensures continuity and consistency of patient services across multiple areas.
* Collaborates with various teams to advance clinical education and patient care operations.
* Organizes and distributes personnel work schedules for assigned area, collaborating with other team leads to ensure coverage of front desk areas.
* Verifies patient insurance eligibility and obtain referrals and/or authorizations required for payment.
* Provides oversight of scheduling patient appointments (by phone and in person), appointment confirmations and prompt patient check in.
* Assists with entering treatment codes and collection of protected health information (PHI) in accordance with relevant policies and regulations.

**30%: Patient and Financial Records**

* Produces reports in accordance with cash handling policies for further evaluation.
* Ensures patient information is up to date and collects and documents payments in electronic health records.
* Maintains patient records and statistics in accordance with procedures.
* Maintains patient financial accounts and issues patient refunds when necessary.
* Balances monies received at the conclusion of each shift and is responsible for depositing those monies with a security escort.

**10%: Projects**

* Assists with various projects as assigned.

**Qualifications**

**Required Education:**

* High school diploma or equivalent combination of education and experience.

**Required Experience:**

* Five years of related experience in a customer service or clerical role, preferably in a medical or dental environment.

**Required Licenses and Certifications:**

* None.

**Required Knowledge, Skills, and Abilities:**

* Ability to multitask and work cooperatively with others.
* Strong interpersonal and organization skills.
* Strong verbal and written communication skills.
* Knowledge of multiline phone system use.
* Knowledge of standard office protocol and office equipment use.
* Knowledge of word processing and spreadsheet applications.

**Preferred Qualifications:**

* Awareness of and adherence to (HIPAA) regulations and State laws pertaining to health care information and records.
* Related experience in customer service.
* Related experience in a dental/medical/clinical/healthcare setting.
* Bilingual: English/Spanish.
* High-level Axium knowledge.
* Experience problem-solving.
* Experience flexing into roles for other teams/departments, with multidisciplinary knowledge.
* Experience leading team efforts.
* Cash handling experience.

**Additional Information**

**Machines or equipment used in the performance of essential duties:**

* Computer
* Telephone

**Physical Requirements:**

* None

**Other Requirements and Factors:**

* This position is security sensitive
* This position requires compliance with state and federal laws/codes and Texas A&M University System/TAMU policies, regulations, rules and procedures
* All tasks and job responsibilities must be performed safely without injury to self or others in compliance with System and University safety requirements

**Is this role ORP Eligible? If so, it needs to meet the criteria on the** [**Rules and Regulations of the Texas Higher Education Coordinating Board**](https://reportcenter.highered.texas.gov/reports/data/user-friendly-version-of-ch-25/)**.**

**Yes**

**No**

**Does this classification have the ability to work from an alternative work location?**

**Yes**

**No**