

# **BUSINESS CENTER**

## **LEVEL 1**

### **Overview**

The Level 1 Business Center employee is a non-exempt employee. He or she is responsible for the following Business Center Activities: reception, data input, and customer service. The employee provides support to all personnel for tasks such as appointment scheduling and confirmation, recall, insurance eligibility verification, message triage, patient balance and insurance collections.

The Business Center has key functions in ensuring that the Corporation's Quality of Services and Patient Outcome Measures are satisfactorily met within the Federal Guidelines for the MACRA Quality Payment Program and the CMS Merit Based Incentive Payment System (MIPS). The Level 1 Business Center employee reports to the Supervisor of the Business Center.

### **Tasks**

The tasks of a Level 1 Business Center employee are divided into three areas:

#### **Check-In/Customer Service Greeter**

1. Greets patients and visitors in a prompt, courteous manner.
2. Checks-in patients, verifying and updating insurance and demographic information while protecting patient privacy under HIPAA.
3. Assesses insurance benefits, advising patients of any deductibles, co-pays or coinsurance that is collected at time of service. Collects and posts money to the patient's account within EPM, providing patients with receipts.
4. Prepares Fee Sheets/ Routing Sheets for physicians and opticians.
5. Offers and collects patient quality assurance surveys. Distributes new patient welcome packets.
6. Assigns patient a Pre-Appointment slot for their Annual Examination at the conclusion of their initial examination.
7. Assists with telephone triage for incoming calls.
8. Follows-up on preceding day patient no-shows and cancellations.

9. Scans and sorts correspondence and eligibility verification into patient charts.
10. Coordinates distribution of all incoming faxes.
11. Supervises tidiness of lobby and reception areas for proper presentation to patients and visitors.
12. Closes out daily batches and prepares deposit slips for that register.
13. Assess supply needs for department.
14. Maintains a clean and tidy work environment.

### **Check-Out/Customer Service Closer**

1. Greets patients as they complete their examinations.
2. Assess any balance due that has not been collected at the start of the visit and collects payments for these charges. Provides patients with itemized receipts.
3. Enters payments into EPM providing patients with receipts.
4. Schedules follow-up appointments as necessary with physicians, opticians, technicians, surgical technicians and patient educators.
5. Answers in-coming telephone lines and triages those calls.
6. Monitors schedules and alerts the Supervisor of scheduling issues.
7. Provides back-up for Greeter/Check-In position.
8. Enters a recall program in EPM for patients without Pre-Appoints.
9. Obtains Insurance Eligibility Confirmation on each patient prior to their appointment.
10. Maintains a clean and tidy work environment.

### **Telephone Scheduling in the Call Center**

1. Follows guidelines to effectively interview and schedule patients according to the provider templates in EPM.
2. Uses independent judgment to balance the schedules and triage the patients according to their needs.
3. Checks Practice voicemail throughout the day for issues that need follow-up.
4. Able to obtain correct demographic data, and email or mail new patient packets to new patients to the practice.
5. Able to correctly telephone transfer calls and uses independent judgment to find solutions to issues that are affecting patients.

6. Follows guidelines to implement our patient recall program with both written and telephone reminders.
7. Assists in patient recall activities via our electronic patient contact portals. Sends recall postcards to pre-appoint patients when calling to confirm appointments.

### **Summary**

The duties performed by a Level 1 Business Center employee are key to the success of the business operations of the Practice. It is expected that all personnel will perform their duties in a kind, cheerful and courteous manner, thus representing the professional philosophy of the Practice. It is expected that all personnel are dedicated to protecting the confidentiality of our patients and their medical data stored in our electronic health records. In addition to the duties described above, there may be an occasion when a Level 1 Business Center staff member may be needed to assist in other areas of the Practice. It is understood that this job description is only a general outline of the position's main duties and that changes can be made as needed and other duties can be assigned.