

## AMBULATORY CARE SERIES

<u>Code No.</u>	<u>Class Title</u>	<u>Occ. Area</u>	<u>Work Area</u>	<u>Prob. Period</u>	<u>Effective Date</u>
4647(0058)	Ambulatory Care Aide I	04	445	6 mo.	04/02/93
4648(0058)	Ambulatory Care Aide II	04	445	6 mo.	04/02/93
4658(0172)	Ambulatory Care Assistant	04	445	6 mo.	08/29/86
3436	Ambulatory Care Supervisor	03	441	6 mo.	08/29/86
2321	Ambulatory Care Manager	03	441	6 mo.	08/29/86

### *Promotional Line: 298*

#### Series Narrative

Employees in this series provide a range of non-medical support services in an ambulatory care center or other health care facility providing out-patient services. They apply a knowledge of policies and procedures used regarding patient insurance, billing and account maintenance, and collections.

Employees typically:

- perform reception duties, including scheduling of patient appointments
- interview patients to obtain demographic information and orient them to the services, policies, and/or procedures of the facility
- review, update, and maintain medical records
- perform billing and cashiering duties
- operate data entry equipment and other auxiliary equipment
- establish and maintain effective public relations with patients and their families in regards to non-medical services provided by the clinic, and
- at the upper levels, counsel patients regarding their accounts and supervise lower level staff and/or manage the activities of the patient services areas of the clinic.

#### DESCRIPTIONS OF LEVELS OF WORK

##### Level I: Ambulatory Care Aide I 4647(0058)

Employees in this class are entry level aides who receive training in and perform a variety of routine non-medical patient-service duties in a clinic. They work under direct supervision of higher level personnel.

An Ambulatory Care Aide I typically –

1. receives on-the-job training and detailed instruction and performs patient-related clinic activities in several of the following areas:

- (a) operates data entry equipment to enter, review, and/or retrieve demographic information on established patients
  - (b) assists in the generation of patient charge tickets and/or other materials via CRT terminal and auxiliary equipment (such as printers)
  - (c) assists in the creation and/or maintenance of files and records for the unit (such as patient files, financial files, and patient directories)
  - (d) performs clinic reception duties, including answering incoming telephone calls, referring callers to appropriate person(s), and scheduling out-patient clinic appointments in accordance with clinic guidelines
  - (e) assembles and prepares patient information forms and assists with the completion of these forms (such as release of information and signature authorization forms)
  - (f) schedules appointments for inpatient services in a hospital or other related medical facility, including hospital admissions, surgeries, x-ray, and special testing procedures
  - (g) accepts patient payments and prepares related forms
2. performs other related duties assigned

**Level II: Ambulatory Care Aide II****4648(0058)**

Employees at this level are experienced aides capable of dealing with normal clerical duties in several patient-service areas of a clinic. They may function independently in a separate out-patient clinic. They work under general supervision from higher level personnel.

An Ambulatory Care Aide II typically –

1. operates data entry equipment with skill in order to enter, review, and/or retrieve demographic information on new and established patients
2. generates patient charge tickets with responsibility for retrieval and accuracy of information
3. establishes and maintains files and/or records for unit (such as patient medical records, patient financial files, patient directories, and activity summaries)
4. may assist in the training of new Aides or other clerical staff; monitors work completed and alerts superiors to problems that may occur
5. informs new patients of institutional and/or unit billing/payment/insurance procedures and guidelines and responds to standard questions regarding them (such as acceptable methods of payment, insurance assignment, and completion of insurance forms)
6. independently performs clinic reception duties delineated at Level I of this series, with some responsibility for decision making and identifying priorities

7. performs other clerical duties as needed or assigned

**Level III: Ambulatory Care Assistant****4658(0172)**

Employees at this level provide patients with a broad range of complex, individualized clerical services. They may function as lead workers or may function independently in a clinical unit. They work under general supervision from higher level personnel.

An Ambulatory Care Assistant typically –

1. enters patient registration on CRT in accordance with established policies and procedures
2. coordinates patients' appointment schedules and serves as information source to patients
3. initiates and retrieves medical records (such as emergency room sheets and x-rays) and other source documents either manually or with a computer
4. initiates, reviews, and monitors clinic service billing to ensure accuracy, completeness, and timeliness
5. may assist in the supervision of other clerical staff in the clinical unit; oversees activities and/or performance, such as:
  - assigning work priorities according to established schedule or adjusting them as needed
  - providing assistance and/or instruction
  - monitoring work flow
  - training new staff
6. registers patients in accordance with prescribed policies and procedures as needed
7. accepts patient payments and maintains necessary receipt logs; may be responsible for balancing cash drawers/registers
8. completes activity reports on patient activities; maintains inventory of equipment and/or supplies; prepares reports as requested by superiors
9. recommends possible changes in current operating procedures or suggests the development of new ones
10. performs clinic reception duties delineated at lower levels of this series as required
11. performs other related duties as needed or assigned

**Level IV: Ambulatory Care Supervisor****3436**

Employees at this level supervise and coordinate on-site activities and personnel in addition to counseling patients with patient account problems. They work under general supervision from higher level personnel.

An Ambulatory Care Supervisor typically –

1. assigns, directs, and evaluates the work of staff; recommends hiring, firing, and disciplinary action to superiors
2. develops and/or assists superiors in the development of unit operating procedures and guidelines; ensures proper implementation of procedures and guidelines by support staff; maintains and updates procedures manuals
3. serves as a liaison for unit and other auxiliary personnel (such as medical records, laboratory, or billing and collections); resolves any problems or deficiencies as they occur
4. assists patients who have problem accounts and/or delinquent accounts; sets up preliminary pay schedules when appropriate; refers patients with complex account problems and/or severely delinquent accounts to superiors or to other staff, as designated
5. investigates and follows up on special account actions; completes necessary forms and records and forwards to appropriate offices (such as refunds, write-offs, or adjustments)
6. establishes and maintains contact with appropriate third party payer agencies for referral purposes; processes related forms and maintains appropriate follow up
7. monitors the completion of patient charge tickets; audits for proper coding and pricing
8. attends meetings related to clinic operations or other related meetings as assigned
9. registers patients in accordance with prescribed policies and procedures as needed
10. operates CRT terminals and auxiliary equipment as required
11. performs other related duties as assigned

**Level V: Ambulatory Care Manager**

**2321**

Employees at this level manage and coordinate the operation of an ambulatory care facility in accordance with policies and standards of performance. They work under the direction of a medical director and/or departmental administrator.

An Ambulatory Care Manager typically –

1. ensures the efficient and timely performance of clerical activities and staff in a clinical unit; assigns, directs, and evaluates the work of staff directly and/or through supervisory staff
2. monitors quality of work and services (such as ensuring that payment-collection functions are performed according to policies and procedures); orients and trains staff
3. directs various services throughout the facility (such as supervising and monitoring the preparation, processing, and completion of patient billing for clinic services)

4. manages smooth clinic activity flow for patients (such as coordinating patient-appointment scheduling, monitoring efficiency and effectiveness of appointment processing, and assuring that patients are registered in accordance with policies and procedures)
5. counsels and provides personal assistance to patients regarding account status, financial policies and procedures; responds to non-routine, complex questions and/or hospital support services; advises physicians and other staff of special problems or needs of patients as required
6. provides support to physicians, nurses, and patients to ensure quality and efficient patient processing and care
7. implements and evaluates the initiation and retrieval of medical records for clinic patients
8. ensures availability and replacement of supplies, equipment, and other resources needed to maintain operations
9. develops budgets, estimates, or justifications and monitors the use of such funds
10. implements departmental rules, policies, and procedures; recommends revisions
11. interprets and explains billing, hospital, and/or departmental policies and procedures to patients/physicians
12. complies, analyzes, and organizes data related to clinic activities into reports; documents problem areas and recommends improvements
13. participates in staff meetings and conferences
14. may register patients in accordance with prescribed policies and procedures when necessary
15. performs other related duties as assigned

**MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO ALL LEVELS OF SERIES:**

**CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

None

**PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB**

1. ability and willingness to assist patients who may be ill or injured and their families
2. ability to work under pressure and amid interruptions
3. ability and willingness to deal with a wide variety of people
4. ability to read, comprehend, and follow complex instructions and guidelines

ADDITIONAL MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:**Level I: Ambulatory Care Aide I****4647(0058)**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

None

## PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. ability to perform routine keyboarding accurately
2. ability to work with money
3. ability to perform simple calculations (such as adding, subtracting, and totaling)

**Level II: Ambulatory Care Aide II****4648(0058)**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following types of preparation:
  - (a) work experience in a health care facility performing duties in one or more patient service areas (such as admissions, billing, or collections)
  - (b) clerical work experience that included the operation of computerized data equipment and extensive public contact
  - (c) credit for college course work in one or a combination of the following fields: business, finance, computer science, public administration, or social science

that totals 1.0 unit according to the following conversion rates:

1 year of "a" = 1.0 unit

1 year of "b" = 0.5 unit maximum<sup>1</sup>

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<sup>1</sup>That is, up to one half (or 0.5 unit) of the total preparation required to satisfy requirement 1 may be this type of clerical experience. The balance must be supplied by one or more of the other types of preparation listed above.

6 semester hours of "c" = 0.5 unit maximum<sup>2</sup>.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

#### PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. ability to perform routine keyboarding accurately
2. ability to train others
3. ability to work with money and make accurate change
4. ability to perform simple calculations (such as adding, subtracting, and totaling)

#### **Level III: Ambulatory Care Assistant**

**4658(0172)**

#### CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following types of preparation:
  - (a) progressively more responsible experience in patient services work (such as admissions, unit clerk, billing, collection, and/or interviewing) in a health care facility
  - (b) credit for college course work in one or a combination of the following fields: business, finance, computer science, public administration, or social science

that totals 1.0 unit according to the following conversion rates:

2 years of "a" = 1.0 unit

12 semester hours of "b" = 0.5 unit maximum<sup>3</sup>.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

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<sup>2</sup>That is, up to one half (or 0.5 unit) of the total preparation required to satisfy requirement 1 may be this type of college training. The balance must be supplied by one or more of the other types of preparation listed above.

<sup>3</sup>That is, up to one half (or 0.5 unit) of the total preparation required to satisfy requirement 1 may be this type of college training. The balance must be supplied by the other type of preparation listed above.

## PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of medical terminology
2. knowledge of medical records procedures
3. knowledge of medical laboratory and x-ray, billing, and admissions procedures
4. knowledge of clinic forms
5. knowledge of automated admissions and/or billing systems
6. skill in maintaining detailed records
7. skill in communicating effectively with a wide variety of persons from different economic and cultural backgrounds
8. ability to lead and direct the work of others
9. ability to add, subtract, and work with percentages
10. ability to perform cash transactions effectively
11. ability to communicate in writing
12. ability to establish and maintain working relationships with medical staff

**Level IV: Ambulatory Care Supervisor****3436**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following types of preparation:
  - (a) progressively more responsible experience in patient services work (such as admissions, unit clerk, billing, collection, and/or interviewing) in a health care facility
  - (b) credit for college course work in one or a combination of the following fields: business, finance, computer science, public administration, or social science

that totals 1.0 unit according to the following conversion rates:

3 years of "a" = 1.0 unit

18 semester hours of "b" = 0.5 unit maximum<sup>4</sup>.

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<sup>4</sup>That is, up to one half (or 0.5 unit) of the total preparation required to satisfy requirement 1 may be this type of college training. The balance must be supplied by the other type of preparation listed above.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

#### PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of registration and billing procedures
2. knowledge of third party payer reimbursement, disability claim forms, and insurance billing regulations
3. knowledge of automated admitting and billing systems
4. skill in interviewing patients who have a variety of financial problems
5. skill in interpreting and implementing procedures, guidelines, and policies
6. skill in developing reports and analyzing data
7. ability to supervise lower level staff
8. ability to establish and maintain cooperative working relationships with individuals and agencies internal and external to the unit and/or institution

#### **Level V: Ambulatory Care Manager**

**2321**

#### CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following types of preparation:
  - (a) progressively more responsible experience in patient services work (such as admissions, unit clerk, billing, collection, and/or interviewing) in a health care facility
  - (b) credit for college course work in one or a combination of the following fields: business, finance, computer science, public administration, or social science

that totals 1.0 unit according to the following conversion rates:

4 years of "a" = 1.0 unit

36 semester hours of "b" = 0.75 unit maximum<sup>5</sup>.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

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<sup>5</sup>That is, up to 3/4 (or 0.75 unit) of the total preparation required to satisfy requirement 1 may be this type of college training. The balance must be supplied by the other type of preparation listed above.

2. one year of work experience in a health care facility that included responsibility for the supervision of staff and/or responsibility for the organization, coordination, and completion of clerical activities in an assigned area. (This experience may be used to meet the requirements listed in requirement 1 above.)

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of medical terminology
2. knowledge of various hospital and/or clinic departmental services
3. knowledge of hospital pre-admission and admission procedures
4. knowledge of registration and billing procedures
5. knowledge of third party reimbursement, disability claim forms, and insurance billing regulations
6. knowledge of automated admitting and billing systems
7. skill in developing reports and analyzing data
8. ability to coordinate and manage operations of the clerical patient services area of a clinic
9. ability to establish and maintain cooperative working relationships with clerical and professional staff
10. ability to interpret policies, procedures, and guidelines
11. ability to interpret a variety of financial, diagnostic, and internal codes

Ambulatory Care Aide I.....	REVISED
Ambulatory Care Aide II.....	REVISED
Ambulatory Care Assistant .....	REVISED
Ambulatory Care Supervisor.....	NEW
Ambulatory Care Manager.....	REVISED