

**JOB DESCRIPTION**

**POSITION TITLE:** Call Center Agent **REPORTS TO:** Call Center Supervisor

**DEPARTMENT:** Operations **EMPLOYMENT STATUS:** Non-Exempt, Hourly

**LOCATION:** Bellingham

**JOB PURPOSE:** To coordinate clinic appointments, answer patient questions, assist call center supervisor in business performance, and represent the clinic in all telephone interactions. To provide direct, high-quality customer service to all callers and maintain a professional and friendly atmosphere. UCNW manages patient care using a team-based approach in our interactions with patients and working to achieve stated objectives and outcomes.

**JOB QUALIFICATIONS:** Must demonstrate good communication skills and general knowledge of patient scheduling, including proven telephone and computer skills.

**Education:** High School education or GED required; AA degree or technical certificate preferred. Bilingual in Spanish a plus.

**Experience:** Requires one year of experience in customer service, utilizing data entry skills, preferably in a medical or dental office setting. Call center experience preferred. Experience dealing with underserved populations and cultural competency a plus.

**Certification and Licensure:** N/A

**Specialized Skills & Knowledge:** Must have general office skills, including excellent data entry and computing skills. Requires basic knowledge of computers, including Microsoft Office Products (must be proficient with Excel and be able to use Outlook and Word). Must have proficient keyboarding skills, be able to input patient data quickly and accurately, and have the ability to use office equipment (fax, photo copier, phone system).Must demonstrate excellent communication and customer service skills in a demanding fast paced environment with constant public contact, frequent interruptions, and occasional crisis situations. Must be able to understand and respond effectively and with sensitivity to special population groups, including those defined by race, ethnicity, language, age, gender, sexual orientation, economic standing, & others.

**Blood-Borne Pathogens Exposure:** Category: III

This position’s roles and functions in our team-based model include:

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| **JOB DUTIES AND RESPONSIBILITIES** | **JOB PERFORMANCE STANDARDS** |
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| **Communication:** | 1. Asks for direction when unsure of job expectation. |
|  | 1. Makes suggestions and addresses concerns in a constructive manner. |
|  | 1. Utilizes appropriate channels of communication in problem-solving and conflict resolution. |
|  | 1. Communicates effectively and courteously to all UCNW staff. |
| **Organization & Time Mgmt.:** | 1. Does not allow personal issues to interfere with workload; keeps social interaction with other staff to a minimum. |
|  | 1. Takes and returns from breaks and lunch times in a timely manner. |
|  | 1. Maintains a clean, orderly and professional work area. |
|  | 1. Seeks out appropriate uses of time during non-busy periods. |
| **Safety/CQI:** | 1. Ensures safe work environment and promotes accident prevention. |
|  | 1. Utilizes cause for concern form to identify situations that have an impact on care delivery, safety or customer service. |
| **Work Ethic:** | 1. Consistently demonstrates strict adherence to policies and procedures. |  |
|  | 1. Takes responsibility for own actions and seeks to correct any mistakes. |  |
|  | 1. Consistently reports to work on date and time scheduled. |
|  | 1. Self-initiates and follows through on assignments in a timely manner. |
| **Team Contribution:** | 1. Participates in and supports team meetings, activities, and/or problem solving. |
|  | 1. Promotes positive team work and cohesiveness between all staff. |
|  | 1. Provides constructive and creative recommendations for improvements in own area of responsibility or the clinics system as a whole. |
|  | 1. Acts as a resource communicates appropriate knowledge, skills and conduct. |
| **Service Excellence:** | 1. Maintains a high level of quality, accuracy and neatness in work performed. |
|  | 1. Remains calm and tactful during stressful situations, emergencies and confrontations. |
|  | 1. Prioritizes customer service and customer satisfaction. |
|  | 1. Demonstrates an awareness of and commitment to the goals and mission of UCNW. |
| **Professionalism:** | 1. Maintains appropriate personal boundaries with clients. |
|  | 1. Accepts supervision and criticism in a constructive manner. |
|  | 1. Maintains professional appearance appropriate for position. |
|  | 1. Maintains organizational and patient confidentiality. |
|  | 1. Demonstrates an ability to adapt to change. |
| **Scheduling Appointments:** | 1. Ability to grasp knowledge of various scheduling protocols based on appointment type, department limitations and patient need. |
|  | 1. Appropriately reschedule cancels and no-shows. |
| **Ongoing Call Center Agent Duties** | 1. Answers inbound calls and responds to callers needs in a professional manner; answers within three (3) rings. |
|  | 1. Directs phone calls to appropriate team members; screens for urgent vs. non-urgent matters so as to keep clinic staff interruptions to a minimum. |
|  | 1. Collects all necessary registration information for new patient appointments by telephone. |
|  | 1. Utilizes EMR to research patient questions regarding referrals, next appointment needed and clinic contact. |
|  | 1. Consistently notes N/S and cancellations per protocol and launches NS/CX documents appropriately. |
|  | 1. Learn urgent call management techniques. |
|  | 1. Gives patients positive feedback when appropriate (thanks for having insurance information, thanks for calling us in advance to cancel your appointment, etc.). to reinforce expectations. |
|  | 1. Demonstrates knowledge of all required aspects of insurance. |
|  | 1. Performs high level of accurate data entry including demographics and insurance entry. |
|  | 1. Understands and consistently applies protocols for every call center process. Takes ownership for understanding new or expanded duties and protocols. |
|  | 1. Seeks to provide excellent customer service by appropriately responding to each caller’s needs. |
|  | 1. Communicate call center specific needs to supervisor. |
| **Other** | 1. Assists as needed. |
|  | 1. Other duties as assigned |

**PHYSICAL, SENSORY, ENVIRONMENTAL QUALIFICATIONS:**

In a typical day, this job involves the activities listed below. Indicate the frequency of performance of each activity by placing a check mark (✓) in the appropriate column.

R = rarely *(less than 0.5 hour per day)*

O = occasionally *(0.5 to 2.5 hours per day)*

F = frequently *(2.5 to 5.5 hours per day)*

C = continually *(5.5 to 8 hours per day)*

NA = not applicable

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| **Physical Activity** | **R** | **O** | **F** | **C** | **NA** | **Describe any job duty which requires repetition or a unique application of the activity.** |
| Sitting |  |  |  | **✓** |  |  |
| Stationary standing |  | **✓** |  |  |  |  |
| Walking |  | **✓** |  |  |  |  |
| Ability to be mobile |  | **✓** |  |  |  |  |
| Crouching (bend at Knee) | **✓** |  |  |  |  |  |
| Kneeling/crawling | **✓** |  |  |  |  |  |
| Stooping (bend at waist) | **✓** |  |  |  |  |  |
| Twisting (knees/waist/neck) | **✓** |  |  |  |  |  |
| Turning/Pivoting | **✓** |  | **✓** |  |  |  |
| Climbing | **✓** |  |  |  |  |  |
| Balancing | **✓** |  |  |  |  |  |
| Reaching overhead |  | **✓** |  |  |  |  |
| Reaching extension |  | **✓** |  |  |  |  |
| Grasping |  | **✓** |  |  |  |  |
| Pinching |  | **✓** |  |  |  |  |
| Pushing/Pulling: |  | **✓** |  |  |  |  |
| Typical weight:  Circle the appropriate weight in pounds  1-10 11-20 21-30 31-40  41-60 61-80 81-100 >100 |  |  |  |  |  |  |
| Maximum weight:  Circle the appropriate weight in pounds  1-10 11-20 21-30 31-40  41-60 61-80 81-100 >100 |  |  |  |  |  |  |
| Lifting/Carrying: | **✓** |  |  |  |  |  |
| Typical weight:  Circle the appropriate weight in pounds  1-10 11-20 21-30 31-40  41-60 61-80 81-100 >100 |  |  |  |  |  |  |
| Maximum weight:  Circle the appropriate weight in pounds  1-10 11-20 21-30 31-40  41-60 61-80 81-100 >100 |  |  |  |  |  |  |
| Other physical activities |  |  |  |  | **✓** | Keyboarding/phones |
| **Sensory Activities** | **R** | **O** | **F** | **C** | **NA** | **Describe any job duty which requires repetition or a unique application of the activity.** |
| Talking in person |  |  | **✓** |  |  |  |
| Talking on telephone |  |  |  | **✓** |  |  |
| Hearing in person |  |  | **✓** |  |  |  |
| Hearing on telephone |  |  |  | **✓** |  |  |
| Vision for close work |  |  |  | **✓** |  |  |
| **Environmental Factors** | **SPECIFY** | | | | | |
| Safety requirement:  -clothing  -required safety equipment  -activities performed | Must comply with company safety and infection control policies as needed. | | | | | |
| Exposures:  -fumes  -chemicals  -blood or other bodily fluids  -cold/heat  -dust | Must comply with company safety and infection control policies as needed. | | | | | |
| Operation of equipment, vehicles or tools | N/A | | | | | |
| Required infection control standards | Review policy. | | | | | |
| Other environmental factors | N/A | | | | | |

I, the undersigned, acknowledge that I have read the above job description and agree that it defines the position as it currently exists. The undersigned also understand that the above is intended to describe the general content of and requirements for performance of this job. It is not to be considered as an exhaustive statement of duties, responsibilities, or requirements and does not limit the assignment of additional duties at the discretion of the supervisor.

**Employee Signature: Date:**

**Supervisor Signature: Date:**