



## Job Description

### PATIENT ENGAGEMENT SPECIALIST

**Date:** May 2021 \_\_\_\_\_ Exempt \_\_\_X\_\_\_ Non-Exempt

**Department:** Health Center

Written By: Cheryle Pickle, CMPE  
Approved By: Karin Hennings,  
Administrative Director/CEO

**Compensation:** \$17.16 – 21.87 per hour

**Reports To:** Front Office Lead

#### JOB SUMMARY:

The *Patient Engagement Specialist* is bilingual in English/Spanish and has mastered the clerical duties related to patient visits. They are an expert in phone communication specifically communicating with patients via telephones in a friendly, professional, and welcoming manner. Their primary duty will be to proactively communicate with patients to facilitate adherence to HEDIS (Healthcare Effectiveness Data and Information) measures. They are integral part of the healthcare delivery team. They demonstrate the District's core values of **Compassion, Commitment, and Excellence**. Assist and support the Front Office Lead and Health Center Manager in accordance with current policy and procedure, applicable federal, state, and local standards, guidelines, and regulations. They adhere to principles of service and the philosophy and mission of Del Puerto Health Center in all aspects of job performance. They are keenly aware that they are the District's representative and often the first impression of the Health Center.

#### ASSIGNED AREA RESPONSIBILITIES

The *Patient Engagement Specialist* will be required to perform all specific duties for the assigned area. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Other duties may be assigned.

#### **Patient Outreach**

- Display a positive attitude while helping patients access to health care and overcome barriers.
- Contact new enrollees of all age groups under various health plans to set up initial appointments.
- Coordinate special screening programs sponsored by health plan.
- Schedule and confirm appointments for multiple providers.
- Follow-up with appointment cancelations and no shows.
- Back up the phone center during times of high call volume
- Screen incoming and routine calls; take detailed messages such as patients name, dob, phone number, pharmacy name, and medications before forwarding to clinical staff and providers.
- Confirm insurance eligibility and assist patient with insurance verification.
- Improve patient relationships by showing empathy and address what is important to the patient.
- Advocate for patients and be resourceful in finding solutions to access health care.
- Improve the patient relationship with the Health Center.
- Assist medical providers in retrieving Healthcare Effectiveness Data and Information (HEDIS) to improve health care quality.
- Identify and communicate significant changes in patient's status (potential or actual adverse patient occurrences) to the medical provider.
- Triage the patient's needs to get the appropriate care for the patient within the appropriate timeframe.

- Take patients' medical history, understanding provider and supervisor instructions, and for accurately documenting patients' medical information in Electronic Health Record.
- Reassure patients calmly in stressful situations.
- Properly spell and use medical terminology.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Maintain professionalism in all interactions with patients, family members, providers, office staff, members of the community and related outside agencies.
2. Attend general and medical staff meetings.
3. Maintain cleanliness and organization of the office area assigned to you.
4. Request of office supplies as needed for your area.
5. Maintain confidentiality, exercise discretion, use independent and mature judgment, work independently without constant supervision.
6. Handle confidential and protected health information (PHI); understand of the importance of confidentiality and non-disclosure according to the general standards set forth by HIPAA.
7. Proficiently use Microsoft Office Suite and electronic medical/health records.
8. Understand and constantly apply universal precautions if assisting in patient care.
9. Work with ethnically diverse populations in a culturally sensitive manner.
10. Follow safety protocols and initiate appropriate measures to assure/promote safety/wellbeing of patient, family visitors and staff.
11. Performs other related duties as may be assigned by the Front Office Lead and/or Health Center Manager.

**SUPERVISORY RESPONSIBILITIES:** None

**EDUCATION:**

- High School Diploma or GED

**CERTIFICATIONS**

- Current Cardiopulmonary Resuscitation Card (CPR)
- Typing certificate 35 wpm
- Medical Assistant a plus.

**EXPERIENCE**

- Minimum 1-year experience in health care

**LANGUAGE SKILLS:**

- Bilingual English/Spanish, **required.**

**REASONING ABILITY:**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret and extensive variety of data. Meets and interact with patients, necessary to adjust or change priorities, handle multiple tasks, etc.

**OTHER SKILLS AND ABILITIES:**

- Speak, read, and write English and Spanish fluently. Can record information accurately in English.
- Outstanding customer skills with sensitivity towards patient rights.
- Expert customer service skills.
- Excellent communication skills; intermediate to advanced phone skills.
- Excellent organizational skills.

- Knowledge of medical terminology and common medical office clerical procedures, including computerized billing and accounts payable systems.
- Ability to operate office equipment (copy machine, fax, adding machine, scanner, and computer)
- Ability to multi-task and work effectively in a high-stress and fast-moving environment utilizing good decision-making skills.
- Flexibility and willingness to work on an as-needed basis to meet operational needs of the health center.
- Ability to effectively communicate with patient population and co-workers in a professional manner with a high degree of diplomacy and tact.
- Working with ethnically diverse populations in a culturally sensitive manner.

**PHYSICAL DEMANDS:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit, use hands to finger, handle or feel objects, tools or controls, reach with hands and arms and talk or hear. The employee is occasionally required to stand, walk, climb or balance, stoop or crouch.

The employee may occasionally lift and/or move up to 40 pounds and push up to 100 pounds on wheels. Specific vision abilities required by this job includes close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus. (See complete "Physical Requirements" attached).

**WORK ENVIRONMENT:**

The business office work environment characteristics described here are representative of those they encounter while performing the essential functions of this job.

**RISK EXPOSURE CATEGORY I:** Risk of exposure to blood/body fluids, based on Health Clinic location.

**DISCLAIMER:**

This job description indicates the critical features as described under the headings above. They may be subject to change at any time due to reasonable accommodation or other reasons. The incumbent may be asked to perform other duties as assigned.

**ADDITIONAL INFORMATION**

All your information will be kept confidential according to EEO guidelines.

Del Puerto Health Care District is an Equal Opportunity Employer – Minorities, Females, Veterans, and individuals with disabilities are encouraged to apply. Del Puerto Health Care District participates in E-Verify during the hire process at its location for all new employees.

# JOB DESCRIPTION-PHYSICAL REQUIREMENTS

**TITLE:** Patient Engagement Specialist

Page 4 of 5

Please check one box below in Section I and Section II which apply to this job description. Comments can be made in Section III.

C = Constant (76-100%) F = Frequent (51-76%) O = Occasional (26-50%) S = Seldom (1-25%) N = Never (0%)	E - Regardless of frequency, this activity is indispensable. M - This activity is useful and helpful but not absolutely essential.
--	---

	Section I	Section II			Section III			Comments:
<b>Basic Skills:</b>	<b>C</b>	<b>F</b>	<b>O</b>	<b>S</b>	<b>N</b>	<b>E</b>	<b>M</b>	
Reading	X					X		
Writing	X					X		
Math	X					X		
Talking	X					X		
Hearing	X					X		
<b>Physical Demands:</b>	<b>C</b>	<b>F</b>	<b>O</b>	<b>S</b>	<b>N</b>	<b>E</b>	<b>M</b>	
Sitting		X				X		
Standing		X				X		
Walking		X				X		
Stooping		X				X		
Crawling		X				X		
Climbing			X			X		
Reaching Overhead		X				X		
Crouching		X				X		
Kneeling		X				X		
Balancing		X				X		
Pushing or Pulling (10-100 lbs)			X			X		
Lifting or Carrying		X				X		
10 lbs. or less		X				X		
11 to 25 lbs.		X				X		
26 to 50 lbs.		X				X		
51 to 75 lbs.			X				X	
76 to 100 lbs.			X				X	
Over 100 lbs. (assist lift)				X			X	
Moving Patients				X			X	

# JOB DESCRIPTION-PHYSICAL REQUIREMENTS

TITLE: Patient Engagement Specialist

Page 5 of 5

## Candidate's Statement

I have reviewed the position physical qualification assessment for the job I am applying for. To the best of my knowledge, I am physically capable of safely performing the tasks identified.

I understand that any omission or misrepresentation of material fact in this application may result in refusal of or separation from employment. I hereby authorize the company to make any investigation of my background deemed necessary regarding employment. I have no objection to making application for security clearance, if necessary, signing an employee agreement on confidential information and inventions or taking a medical examination. I agree to abide by all company safety and health rules and to use protective equipment as directed by my supervisor.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date