



The Colorado Health Foundation™

Title: Patient Portal Job Descriptions

Author: The Colorado Health Foundation Patient Portal Funding Opportunity Grantees: Sister Joanna Bruner Family Medicine Center (Sisters of Charity of Leavenworth Health Systems, Inc.), High Plains Community Health Center, Northwest Colorado Health and Summit Community Care Clinic.

Context for Use: These are examples of job descriptions used by clinics to define and fill patient portal related roles and job openings.

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TITLE:	Portal Enrollment Specialist (My Chart)
FACILITY	Saint Joseph Hospital
DEPARTMENT/ Cost Center	Sr. Joanna Bruner Family Medicine 23815201
POSITION REPORTS TO	Director, GME Clinical Operations
CREATION DATE	September 11, 2015
REVISED DATE (with changes)	
REVIEWED DATE (without changes)	
POPULATIONS SERVED (Direct Care areas only) (Please X all that apply) <i>Write specific other populations as appropriate</i>	<input checked="" type="checkbox"/> NEONATAL (Birth to 1 month) <input checked="" type="checkbox"/> INFANT (2-12 months) <input checked="" type="checkbox"/> CHILD (1-12 years) <input checked="" type="checkbox"/> ADOLESCENT (13-18 years) <input checked="" type="checkbox"/> ADULT (19-65 years) <input checked="" type="checkbox"/> GERIATRIC (66 plus years) Populations: Serve underserved persons of various ages with diversified ethnicities
JOB SUMMARY	<p>The Sr. Joanna Bruner Family Medicine Portal Enrollment Specialist will be available to work with patients on a one-on-one basis to provide information regarding the Sr. Joanna Bruner Family Medicine’s Patient Portal. The Portal Enrollment Specialist will explain the options available to the patient, and directly assist with the application / enrollment process through the portal. Portal Enrollment Specialist will work to ensure all individuals have access to our secure web-based healthcare application that enables patients to communicate with their healthcare providers and connects them directly to patient’s Electronic Health Record.</p> <p>The Portal Enrollment Specialist must demonstrate regard for the rights of all patients and provide respectful and considerate care, focused on patient’s individual health educational needs. Portal Enrollment Specialist will provide a safe and confidential environment for patients, families and personnel.</p> <p>As a Bruner Family Medicine Patient Portal Development Specialist you will be part of a team working towards the optimization and implementation of the patient Health Portal as well as of the development of patients and provider resources such as; informational videos and brochures to maximize the patient usage of the portal. In addition you will be responsible for answering any questions / concerns regarding the portal as well as being available to enroll patients and to activate their accounts in the clinic.</p>
JOB DUTIES	<p><u>Demonstration of Care Clinic Values:</u></p> <p>Safety and Confidentiality:</p> <ul style="list-style-type: none"> • Conduct work in a safe and confidential manner; • Maintain strict adherence to safety and confidentiality guidelines and regulations; • Patient safety and patient privacy are of primary importance in all settings. <p>Exceptional Patient Care:</p> <ul style="list-style-type: none"> • Create solutions that add value to the health and wellbeing of patients; • Demonstrate a commitment to service excellence and quality improvement; • Remain graceful and tactful under pressure; • Demonstrate patience and professionalism <p>Integrity:</p> <ul style="list-style-type: none"> • Know and follow applicable laws and regulations; • Demonstrate integrity and honesty; • Behave conscientiously in potential conflict of interest or political situations; • Deal with patients and team members fairly and consistently. <p>Teamwork:</p> <ul style="list-style-type: none"> • Promote the philosophy and mission of Sr. Joanna Bruner Family Medicine • Respect other and honor diversity; • Be straightforward and direct in communicating with co-workers, patients, vendors and partners; • Contribute to team’s mission / goal • Demonstrate appropriate balance of work and personal life

	<p>Essential Functions: Portal Enrollment Specialist must demonstrate accountability and responsibility for duties and tasks associated with the position. This position must acquire, maintain and demonstrate appropriate knowledge level and competencies for all tasks associated with the position. The schedule of the Portal Enrollment Specialist may vary, including some evening and weekend hours as needed.</p> <p>Patient Overview, Assignments and Case Load: Portal Enrollment Specialist will review medical schedules every morning and determine which patients are eligible to be enrolled into the clinics patient portal. The Portal Enrollment Specialist will meet with patients either in the check-in area, lobby or while they are checking out, in the patient exam room.</p> <p>Documentation: The Portal Enrollment Specialist is responsible for thoroughly and accurately documenting each patient interaction and enrollments in the “portal tracking sheet” on a daily basis. Documentation must contain quality information that accurately reflects patient encounters.</p> <p>Patient Navigation Service: The Portal Enrollment Specialist uses resources to anticipate, address, and overcome barriers to care and to guide patients through the health care system. Portal Enrollment Specialist may assist patients by updating demographic and pharmacy information. The Portal Enrollment Specialist may assist in creating email accounts for patients and help them navigate the patient portal.</p> <p>Use of Educational Materials and Resources: The Portal Enrollment Specialist will provide patients with a Patient Welcome letter with a temporary password. It is important to note that a user name and password MAY NOT be written on the same piece of paper and given to the patient. The Portal Enrollment Specialist will make sure to provide educational materials or clinic summaries in Spanish if patient has identified Spanish as their primary language.</p> <p>New Patient Orientation: The Portal Enrollment Specialist should be familiar with Care Clinics services in order to prove an overview of our services if needed. The Portal Enrollment Specialist will spend one on one time with the patients to communicate and explain specific information about consent forms, HIPAA requirements, no-show policy, care card renewal process, clinic hours, what to do in an emergency, fee codes and payments overview.</p> <ul style="list-style-type: none"> • Performs other related duties as appropriate and as assigned <p>The attached Job Description details the essential functions of your position. The list below is also considered to be essential functions of your position and all employees within SCL Health are expected to meet the following in their day-to-day work:</p> <ul style="list-style-type: none"> • Help Bruner Family Medicine boost usage of health portal by patients • Responsible for in-clinic patient enrollment / account activation development of training videos / patient engagement videos and surveys • Manage patient and family concerns regarding portal • Work in tandem with MA to help train MA to provide portal support • Identify best method to reach patients via mobile devices, etc... • Collect real time feedback from patients and or their families • Be available to work as scheduled and report to work on time • Be available to work overtime if needed • Be willing to accept supervision and work well with others • Be respectful of all with whom you interact and follow the SCL Health Service Behaviors • Be well groomed and dressed appropriately for your role • Be in compliance with the drug and alcohol policy as stated in the Employee Handbook • Be sufficiently rested to perform your duties throughout the period assigned • Demonstrate a willingness to learn • Be able to communicate clearly, think clearly, and concentrate on assigned tasks
<p>QUALIFICATIONS AND EXPERIENCE</p>	<p>To Perform this job successfully, an individual must be able to engage in 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.</p> <p>Reasoning and Mental Ability: Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to exercise independent judgment. Self-directing and organized. Ability to reason objectively. Ability to assess, project and plan for patient’s needs. Ability to interpret state / federal/ agency regulations. Ability to document concisely, accurately and in a timely manner. Ability to handle a variety of duties which may be interrupted or changed by immediate circumstances.</p>

	<p>Interpersonal Skills: Ability to relate cooperatively and constructively with patients, co-workers, administration, physicians and providers, community agencies, referral sources, regulator and other health team members. Ability to enlist the cooperation of others. High tolerance for stress.</p> <p>Required</p> <ul style="list-style-type: none"> • Minimum one (1) year experience in a clinical setting or equivalent as a combination of education and experience • High school diploma or GED equivalent • Bilingual English / Spanish, complete comprehension, literacy and fluency in both languages. • Experience with PC software applications in word processing Word, Excel, Outlook • Experience with iPad • Effectively participate in project meeting and discussions • Ability to develop solutions for technical issues / problems <p>Preferred</p> <ul style="list-style-type: none"> • Experience with PC Software – EPIC, Word, Excel •
<p>LICENSURE/CERTIFICATION/REGISTRY</p>	<ul style="list-style-type: none"> • OSHA required courses for positions, • CPR a plus
<p>MATERIAL/ EQUIPMENT INVOLVED</p>	<ul style="list-style-type: none"> • Computer • Printer • Telephone • Photocopier • Fax machine • iPad
<p>HAZARDOUS EXPOSURE CATEGORY:</p>	<p>Involves no exposure to blood, body fluids, or tissues, although situations can be imagined or hypothesized under which anyone, anywhere, might encounter potential exposure to body fluids.</p>
<p>LIFTING REQUIREMENTS:</p>	<p>Sedentary work. Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time, but may involve walking or standing for brief periods of time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.</p>
<p>OTHER</p>	<p>Work Environment: The work environment is in a healthcare setting and can be fast-paced and involve working directly with patients and healthcare professionals. The individual may also work in a clerical setting. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions for the job. The noise level in the work environment is usually moderate.</p> <p>Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions for this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.</p> <p>Addition to the responsibilities described above, the role may include such other responsibilities, and duties as assigned from time to time, based upon SCL Health needs or requirements.</p>

I have reviewed these job requirements. I am aware that my position has specific competencies related to it and that these competencies must be completed within the prescribed period.

(Employee signature)

(Date)

PHYSICAL REQUIREMENTS: FREQUENCY

Never (N)	Occasionally(O)				Frequently(F)				Constantly(C)				
0%	1 - 33%				34 - 66%				67 - 100%				
To be moved: Include weight of object and distance carried					<u>Description of movement:</u> lift/lower, push/pull, carry, reach above					N	O	F	C
Patients:										X			
Supplies: bottles of water-50 lbs., misc. paper/supply boxes up to 50 lbs. up to 10 yds.					lift/lower, carry, reach above, with assistance						X		
Equipment: computer equipment, typewriters, misc. office equipment up to 50 lbs. up to 10 yds.					lift/lower, carry						X		
Physical	N	O	F	C	Physical	N	O	F	C				
Standing:			X		Fingering:				X				
Walking:			X		Handling:				X				
Sitting:			X		Feeling:		X						
Stooping:			X		Visual acuity: near				X				
Kneeling:			X		Visual acuity: far				X				
Squatting:			X		Depth perception:				X				
Climbing:		X			Color discrimination:				X				
Balancing:		X			Peripheral vision:				X				
Other:					Talking:				X				
Reaching-above shoulder:			X		Hearing:				X				
Reaching-at or below shoulder:			X		Running:	X							
Grasping:				X	Other:								
Physical surroundings:	N	O	F	C	Environmental conditions:	N	O	F	C				
Cold(50f or less):	X				Chemicals:		X						
Heat(90f or more):	X				Gases/Fumes:	X							
Dampness:	X				Dust:			X					
Inside work:				X	Radiation:	X							
Outside work:	X				Other: CRT				X				
Walking surface: carpet/tile, cement/asphalt, various				X	Vibration:		X						
Heights: step stool			X		Noise: low to moderate		X						

(NOTE: Any changes must be pre-approved by Employee Occupational Health Services Department.)

**JOB APPRAISAL SUMMARY AND SKILLS INVENTORY
ASSESSMENT
JOB EXPECTATIONS CRITERIA, PERFORMANCE and EVALUATION SHEET**

TECHNICAL SKILLS	<ul style="list-style-type: none"> • Answering a multi-line telephone • Greeting and directing visitors and patients • Sorting and distributing incoming • Handling routine and overflow typing, large mailings, copying of jobs and other special clerical projects • Computer skills: including input of patient information, retrieval of patient records, updating patient records, scheduling patient appointments.
SERVICE-FOCUS	<ul style="list-style-type: none"> • Meets the expectations and requirements of internal and external customers • Acts with customers in mind • Establishes and maintains effective relationships and gains customers' trust and respect • Develops positive working relationships with customers through responsiveness and delivery of accurate, timely and effective services • Exhibits effort and follow-through in resolving customer problems and needs in a timely manner or keeps customer frequently abreast of development and status of issue • Brings resolution to issues on a timely basis and within policies or established standards
JOB KNOWLEDGE	<ul style="list-style-type: none"> • Able to understand and apply information, policies, procedures and skills required by the position. • Is adept with qualitative, quantitative or technical tools needed to perform the job.
QUALITY OF WORK PRODUCED	<ul style="list-style-type: none"> • Accuracy, neatness and thoroughness with which the employee performs the job • Tasks are performed to completion and errors are minimized • Employee anticipates needs of user and ensures these needs are taken into consideration when completing assignments • Does not always take the quick and easy way, rather ensures quality outcomes and timely work delivery
PRODUCTIVITY / QUANTITY OF WORK	<ul style="list-style-type: none"> • Amount and extent to which work produced consistently meets requirements • Able to complete assigned tasks within a specific time frame • Seeks additional tasks when assigned tasks are completed
PLANNING AND ORGANIZING	<ul style="list-style-type: none"> • Able to plan and effectively organize work recognizing all parties needs • Establishes appropriate priorities and meets deadlines • Anticipates issues so as to improve the quality of products/services produced or delivered • Is viewed by customers and peers as producing quality work with highest level of productivity and efficiency
COMMUNICATIONS	<ul style="list-style-type: none"> • Expresses thoughts clearly and concisely (verbal and written) • Listens attentively to understand information provided by others • Keeps necessary people informed and up-to-date • Demonstrates effective presentation skills • Projects poise and credibility in meetings • Develops all materials with target audience in mind
TEAMWORK / INTERPERSONAL SKILLS	<ul style="list-style-type: none"> • Cooperates with co-workers to participate productively in group environment • Promotes unity and offers support within the group, between functions, and across departments to accomplish objectives • Is sought out by peers to seek resolutions to issues and is thought of as a key contributor to the team • Contributes to a positive work environment that is supportive of coworkers and patients' needs
SUPERVISION REQUIRED	<ul style="list-style-type: none"> • Carries out instructions and responsibilities and follows through with impacted parties/areas, under direct supervision and following established procedures
RELIABILITY	<ul style="list-style-type: none"> • Is dependable in reporting for work as scheduled and on-time • Review impact of any unplanned absences, lateness, or leaving work before the end of the regularly scheduled shift. Also take into account the accurate and timely reporting of time worked, breaks, lunch periods, paid time off, etc.
MANAGING CHANGE (ADAPTABILITY)	<ul style="list-style-type: none"> • Able to understand and adjust to change in priorities, direction, operation, willing to try new ideas.
MANAGING DIVERSITY	<ul style="list-style-type: none"> • Deals effectively with all races, nationalities, cultures, disabilities, ages, gender and sexual orientation • Supports equal and fair treatment of employees, co-workers, patients and visitors



High Plains Community Health Center

Job Description

Mission:	High Plains Community Health Center will be the provider of choice for quality, accessible primary health care in Southeast Colorado.
Job Title:	Patient Portal Specialist
Department:	Operations
Supervisor of Position:	Vice President of Operations
Job Specific Goal:	Successful implementation of the Patient Portal Grant work plan to increase usage of the patient portal by High Plains Community Health Center patients and staff.

Position Summary

Patient Portal Specialist will use the grant work plan as the guide to work with patients, staff and the Portal Team to increase the usage of the patient portal. Activities and planning around the patient portal will include but are not limited to: coordination of Portal Team meetings, creating and implementing workflows for staff, providing patient and staff education, assist with marketing geared towards the patient portal, technology troubleshooting and knowledge, gathering data related to the patient portal, ensuring grant reporting is completed, and other activities related to the implementation of the Patient Portal Grant.

Primary Duties

1. Ensure compliance with and adherence to the Colorado Health Foundation grant requirements and the Patient Portal Work Plan.
 - Completion of reporting to the Colorado Health Foundation specifically related to the Patient Portal Grant.
2. Schedule, plan, and conduct Portal Team meetings.
3. Create and implement workflows for care teams. Work flows will be a step by step guide for teams to enroll and educate patients on signing up and using their patient portal.
4. Provide patient education and training on Patient Portal.
 - Attend free classes offered by High Plains Community Health Center to educate patients.
 - Assist patients in all High Plains Community Health Center clinics in enrolling and utilizing their patient portals.
 - Actively search other opportunities to educate patients on setting up and utilizing their patient portal.
5. Provide staff education and training on Patient Portal.
 - Schedule, plan and conduct staff trainings on the patient portal.
 - Ensure staff has a solid understanding and tools to assist patients with the enrollment process while emphasizing the importance of the patient portal to staff.
 - Work with staff to ensure workflows are accurate and patients are being set up with the patient portal.
6. Actively work with marketing staff to ensure a marketing plan directly related to the patient portal is constructed and implemented.

- Ensure patient portal information is present in marketing material to both patients and staff. This includes but is not limited to: radio ads, print ads, social media representation, print materials, email and other marketing venues as needed.
- 7. Work with the IT Department for setup, maintenance, troubleshooting, and enhancement of the patient portal.
 - Maintain a high level of understanding and familiarity with the patient portal.
 - Work with vendors to ensure that High Plains Community Health Center is current and up to date on available technologies that will increase the usage and functionality of the patient portal.
 - Assist the IT Department with the setup and maintenance of the iPads that will be placed in the community for patient portal utilization.
- 8. Gather data from staff and patients directly relating to the patient portal.
 - Patient portal questions are added to the Patient Satisfaction Survey and data is analyzed.
 - Surveys are conducted with staff and patients in all stages of the grant process and data is analyzed accordingly.
 - Feedback groups are formed and information from those groups is included in the analysis of the patient portal.

Qualifications

1. Patient Portal Specialist must be self-directed, highly motivated, exhibit good people skills, and have the ability to speak in public settings.
2. Associate Degree required with EMR familiarity.
3. Experience working in a public setting, writing grants and accomplishing grant deliverables is preferred.
4. Preferred, but not required, ability to speak both English and Spanish.
5. Preferred, but not required, experience working with a diverse population and/or underserved populations.
6. The position requires a working knowledge of modern office practices and procedures. This includes but is not limited to:
 - Proficiency in using the Internet, Microsoft Office programs and general computer skills.
 - Skill in operating office equipment such as copier, fax machine, scanners, etc.
7. Adherence to the rules and regulations put forth by High Plains Community Health Center's Employee Handbook.
8. Possess customer service skills necessary to provide a positive experience necessary when they speak to employees in person and on the phone.
9. Working well in a team setting and problem solving issues with peers in a positive manner.
10. Other duties as needed and/or requested.

Physical Requirements

Primarily sedentary physical work requiring ability to lift a maximum of 40 pounds; occasional lifting, carrying, walking and standing; frequent hand/eye coordination to operate computer keyboard and office equipment; vision for reading, recording and interpreting information; speech communication and hearing to maintain communication with employees and members of the public.

Type of Position

This is a temporary, full-time, grant-funded, non-exempt position at High Plains Community Health Center. Position is contingent upon continued grant funding.

Northwest Colorado Visiting Nurse Association

Patient Online Access Coordinator

General Statement of Duties:

A non-exempt, full-time position that is responsible for optimizing the use of online access for the community health center patient population. Provide project management for patient portal initiative.

Supervision Received:

Reports to the Director of Performance Improvement.

Supervision Exercised:

None.

Essential Functions:

1. Project Management

- Develop project plans, as well as manage projects and resources
- Lead teams of various functional and technical resources, with internal and external stakeholders
- Manage grant funding budget, reporting, and coordination with grantee
- Take ownership of the Patient Portal Work Plan and ensure timely delivery of milestones and tasks
- Align project plan with deliverables with Meaningful Use patient portal deliverables and Patient Centered Medical Home deliverables
- Coordinate and facilitate team meetings and organize team member involvement
- Facilitates reports and audits on a routine basis to monitor and analyze the utilization rates within the patient portal

2. Responsible for overall two way communication between patients and clinic through the patient portal

- Responsible for logistics in enrollment of patient portal.
- Provide technical assistance to patients with login or other issues and coordinate follow up
- Acts as liason between patients and the patient portal on every level of use
- Develop, train, and implement workflows, processes, and policies regarding patient portal
- Coordinate the use of volunteers and/or interns in patient portal project
- Managing strategy and risk for managing private health information

3. Marketing and Outreach

- Develop marketing and promotion plan, making sure to adhere to the current work plan
- Works with the marketing team to create and manage the content available for marketing the patient portal to our patient
- Provide in reach to staff and outreach to community on the benefits of using our patient portal
- Communicate effectively to patients, staff, and community
- Develop and implement incentive programs or celebrations as determined by the patient portal team

This description of responsibilities is intended to provide only basic guidelines for meeting each responsibility. Additional responsibilities may be added, as appropriate.

Education:

High school diploma required, with some combination of college coursework or equivalent work experience. College degree desired.

Experience:

Background in health and human services, communications, marketing or outreach required. Public outreach or systems work desired.

Requirements:

1. If car is used, must provide proof of adequate insurance coverage totaling at least \$300,000 and valid Colorado driver's license.
2. TB test upon hire and then annual screening thereafter.

Skills:

1. General office skills including use of phone, copier, fax machine and computer
2. Proficient in Microsoft Office applications including Word, Excel and Outlook.
3. Familiarity with electronic databases and collection of program data.
4. Ability to use or learn to use a wide variety of computer applications
5. Able to perform basic mathematical calculations.
1. Excellent interpersonal skills. Sound judgment, relationship management and excellent communication and presentation skills.

Knowledge:

2. Knowledge of project management, team building, and healthcare.
3. Understand Internet, Intranet, and mobile architectures

Abilities:

1. Communicates effectively and professionally with staff and client families.
2. Able to effectively utilize computer software and hardware provided.

Equipment:

1. Daily use of telephone, copier, and other office equipment.
2. Daily use of computer, approximately 4-6 hours per day.

Working Conditions:

1. Position is in a well-lighted, accessible office environment, and involves sitting approximately 90% of the day, walking or standing the remainder.
2. This position meets the criteria for Category 3 of OSHA's guidelines for exposure to biohazards.

I, _____ acknowledge that on this date, I have received the following job description for my present position.

Signature of Employee: _____ Date: _____



summit community
CARE CLINIC

360 Peak One Drive – Suite 100
Post Office Box 4337
Frisco, Colorado 80443

Job Description

Title: Portal Enrollment Specialist
Department: Care Team
Wage Grade: TBD

FLSA Position Status: Non- Exempt
Reports To: Patient Support Services Manager
Date: September 24, 2014

Position Summary: The Summit Community Care Clinic (SCCC) Portal Enrollment Specialist will be available to work with patients on a one-on-one basis to provide information regarding the Summit Community Care Clinic's Patient Portal. The Portal Enrollment Specialist will explain the options available to the patient, and directly assist with the application/enrollment process through the portal. Portal Enrollment Specialist will work to ensure all individuals have access to our secure web-based healthcare application that enables patients to communicate with their health care providers and connects them directly to patient's Electronic Health Record.

The Portal Enrollment Specialist must demonstrate regard for the rights of all patients and provide respectful and considerate care, focused on the patient's individual health educational needs. Portal Enrollment Specialist will provide a safe and confidential environment for patients, families and personnel.

Demonstration of Care Clinic Values:

Safety and Confidentiality:

- Conduct work in a safe and confidential manner;
- Maintain strict adherence to safety and confidentiality guidelines and regulations;
- Patient safety and patient privacy are of primary importance in all settings.

Exceptional Patient Care:

- Create solutions that add value to the health and well being of patients;
- Demonstrate a commitment to service excellence and quality improvement;
- Remain graceful and tactful under pressure;
- Demonstrate patience and professionalism.

Integrity:

- Know and follow applicable laws and regulations;
- Demonstrate integrity and honesty;
- Behave conscientiously in potential conflict of interest or political situations;
- Deal with patients and team members fairly and consistently.

Teamwork:

- Promote the philosophy and mission of SCCC;
- Respect others and honor diversity;
- Be straightforward and direct in communicating with co-workers, patients, vendors and partners;
- Contribute to the team's mission/goals;
- Demonstrate appropriate balance of work and personal life.

Essential Functions:

Portal Enrollment Specialist must demonstrate accountability and responsibility for duties and tasks associated with the position. This position must acquire, maintain and demonstrate appropriate knowledge level and competencies for all tasks associated with the position. The schedule of the Portal Enrollment Specialist may vary, including some evening and weekend hours as needed.

Patient Overview, Assignments & Case Load: Portal Enrollment Specialist will review medical schedules every morning and determine which patients are eligible to be enrolled into the clinic's patient portal. The Portal Enrollment Specialist will meet with patients either in the check-in area, lobby or check-out area.

Documentation: The Portal Enrollment Specialist is responsible for thoroughly and accurately documenting each patient interaction and enrollments in the "portal tracking sheet" on a daily basis. Documentation must contain quality information that accurately reflects patient encounters.

Patient Navigation Services: The Portal Enrollment Specialist uses resources to anticipate, address, and overcome barriers to care and to guide patients through the health care system. Portal Enrollment Specialist may assist patients by updating demographic and pharmacy information. The Portal Enrollment Specialist may assist in creating email accounts for patients and help them navigate the patient portal.

Use of Educational Materials and Resources: The Portal Enrollment Specialist will provide patients with a Patient Welcome letter with a temporary password written in the upper right hand corner. It is important to note that a user name and password MAY NOT be written on the same piece of paper and given to the patient. The Portal Enrollment Specialist will make sure to provide educational materials or clinic summaries in Spanish if patient has identified Spanish as their primary language.

New Patient Orientation: The Portal Enrollment Specialist should be familiar with Care Clinic services in order to provide an overview of our services if needed. The Portal Enrollment Specialist will spend one on one time with the patients to communicate and explain specific information about consent forms, HIPAA requirements, no-show policy, care card renewal process, clinic hours, what to do in an emergency, fee codes and payment overview.

Qualifications: To perform this job successfully, an individual must be able to engage in 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.

Education/Experience: At least one (1) year experience in a clinical setting or equivalent as a combination of education and experience. Previous non-profit and/or volunteer experience is desirable. High School diploma or equivalent.

Language Ability: Ability to read, write and clearly speak the English and Spanish language, ability to interpret a variety of instructions and deal with multiple variables.

Reasoning and Mental Ability: Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to exercise independent judgment. Self-directing and organized. Ability to reason objectively. Ability to assess, project and plan for patients needs. Ability to interpret state/federal/agency regulations. Ability to document concisely, accurately and in a timely manner. Ability to handle a variety of duties which may be interrupted or changed by immediate circumstances.

Interpersonal Skills: Ability to relate cooperatively and constructively with patients, co-workers, administration, physicians and providers, community agencies, referral sources, regulators and other health team members. Ability to enlist the cooperation of others. High tolerance for stress.

Computer Skills: To perform this job successfully, an individual should have a solid knowledge of word processing software, spreadsheet software and database software.

Certificates and Licenses:
OSHA required courses for positions, CPR a plus.

Supervisory Responsibilities: None

Work Environment:

The work environment is in a healthcare setting and can be fast-paced and involve working directly with patients and healthcare professionals. The individual may also work in a clerical setting. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the job. The noise level in the work environment is usually moderate.

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.

Below are minimal knowledge/physical requirements of this position.

Knowledge	Occasionally	Frequently	Constantly
Reading, Speaking, Writing English			X
Communications Skills			X
Computers			X
Physical			
Walking		X	
Bending		X	
Standing		X	
Sitting		X	
Driving			
Lifting up to 50 lbs. with or without assistance	X		
Stretching/Reaching	X		
Distinguish smell/temperature	X		
Hearing/Seeing			X
Exposure to bloodborne pathogens and infectious disease	X		
Exposure to hazardous material	X		
Climbing	X		
Hand/finger dexterity		X	
Stooping (bend at waist)	X		
Sensory Activities			
Talking in person		X	
Talking on the telephone		X	
Hearing in person		X	
Hearing on the telephone		X	
Vision for close work		X	
Other (specify) Reading, Speaking, Writing Spanish		X	

The above job description is not intended to be an all-inclusive list of duties and standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as assigned by their supervisor.

ACKNOWLEDGED: Supervisor/Manager

Date:

ACKNOWLEDGED: Employee

Date: