1. POSITION IDENTIFICATION

<table>
<thead>
<tr>
<th>Department Name:</th>
<th>Health and Counseling Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number(s):</td>
<td>0006708</td>
</tr>
<tr>
<td>Current Position Classification:</td>
<td>Clerk, Grade 7 (WJQ)</td>
</tr>
<tr>
<td>Department Position Title:</td>
<td>Billing Assistant</td>
</tr>
<tr>
<td>Evaluating Supervisor’s Title:</td>
<td>Manager, Health Finance</td>
</tr>
<tr>
<td>Date Completed:</td>
<td>December 22, 2017</td>
</tr>
<tr>
<td>Part 1 is being completed by:</td>
<td>☒ Employee  ☐ Evaluating Supervisor</td>
</tr>
</tbody>
</table>

2. POSITION SUMMARY

A summary of the major functions of the position in three or four sentences.

Responsible for billing, collecting and reconciling payments received for services provided by Health and Counseling Services. Ensures that proper billing and collection procedures are followed by clinical and support staff at Burnaby Health Clinic and Vancouver Health Clinic. Processes Release of Information requests and ensures compliance of Freedom of Information and Protection of Privacy Act and related SFU policies, guidelines and procedures. Provides information to clients, staff, SFU Community and external agencies regarding primary medical coverage and secondary medical coverage. Occasional Medical Office Assistant (MOA) coverage in reception at Burnaby Health Clinic.

3. MAJOR FUNCTIONS

List the duties and responsibilities of the position in order of frequency (i.e., (D) Daily; (W) Weekly; (M) Monthly; (S) Semester)

Billing Function:

- Conducts billing procedures for all services provided by the Health and Counseling Services. Bills British Columbia Medical Services Provider (MSP), out-of-province provincial health plans, Worksafe BC and Insurance Corporation of British Columbia (ICBC) through MSP and Teleplan using Electronic Medical Records system billing module. Follows current Payment Schedule and preamble established by the Medical Services Commission, WorkSafe BC and ICBC. Bills guard.me insurance and other third party for uninsured services. (D)
• Directs and supports Medical Office Assistants (MOA) for billing clients for uninsured services. (D)

• Generates queries and reports from Electronic Medical Records system (e.g. IntraHealth Profile) to ensure billing completeness and accuracy. Reconciles payments from all sources. (D)

• Prioritizes billing tasks to meet filing deadlines of different agencies and insurers to minimize revenue loss due to billing delays. Recommends process change to Manager, Health Finance and the clinical team to minimize revenue loss due to process delays or deficiencies. (D)

• Investigates rejected claims and billing discrepancies, and takes corrective action required. Communicates with insurance providers (e.g. MSP, WCB, ICBC, guard.me) regarding claims. (D)

• Handles cash receipts and debit card / credit card payments, including safekeeping and deposits of cash payments to appropriate accounts, and keeps accurate records of receipts and deposits. (D)

• Processes refunds, invoice adjustments, invoice reversals and write off according established protocols. (D)

• Prepares statement of account and receivable reports upon request. Follows up outstanding accounts. (D)

• Generates queries and reports from Electronic Medical Records system to report revenue trends and for billing analysis. (M)

• Ensures referrals to specialists are transmitted to MSP for clients insured by MSP and reciprocally billed provinces. (D)

• Keeps current with policies, standards and guidelines regarding Medical Services Plan of B.C., guard.me, StudentCare and other plans used by Health Services clients. (S)

• Updates Fee Schedule in Electronic Medical Record system. (S)

Release of Information Requests

• Processes Release of Information (ROI) requests from lawyers, clinics, SFU clients and other third party. Ensures compliance of Freedom of Information and Protection of Privacy Act / guideline and related SFU policies, guidelines and procedures. (D)

• Reviews ROI requests. Communicates with clients to confirm scope of information disclosure when necessary. Ensures explicit written client consent is in order where appropriate. (D)

• Coordinates with providers regarding ROI requests. Search, retrieve and produces requested information as necessary. Prepares cover letters. Bills lawyers and third party as appropriate. (D)

• Delivers requested information in a timely and secured manner. (D)

Liaison and Administrative Function

• Sends out Appointment Reminders using database application. Collects statistics. (D)

• Ensures timely pre-approval requests for referrals to specialists are sent to guard.me insurance for clients insured by SFU or FIC guard.me plans. (W)

• Communicates with SFU clients regarding medical insurance, eligibility and procedure, including MSP, guard.me and StudentCare. (D)
- Assists international students to apply for BC MSP. Provide information to clients having BC MSP coverage issues to reinstate medical coverage. (D)
- Responds to general inquiries for information on services provided by the Health and Counseling Services (D)

### 4. MINOR FUNCTIONS
List duties and responsibilities that occur annually and periodically throughout the year.

- Provides MOA reception coverage at the Burnaby Health Clinic upon request. (M)
- Trains replacement staff, guides, monitors and directs other staff performing clerical tasks incidental to billing, medical insurance, referral and release of information procedures. (S)
- Assists in development and preparation of promotional and/or administrative brochures (S)
- Performs other related duties consistent with the job description and position title upon request. (S)

### 5. LEVEL OF INDEPENDENCE
Check one box that best describes the level of independence that can be exercised within the position by a fully trained employee.

- ☐ a) Work is provided with specific instructions describing how and when it should be completed.
- ☐ b) Work is provided with general instructions. The employee makes choices about how the work will be completed within deadlines.
- ☒ c) Work is self-directed by the employee. The employee determines what work needs to be completed and when it should be completed to meet deadlines.
- ☐ d) Work is assigned on a project-by-project basis in the form of broad objectives. The employee evaluates what work needs to be completed within general time frames. Provide examples of project work:

### 6. TRAINING EXERCISED
If the position provides training, check each description that applies.

- ☐ a) Not required to provide training to other individuals.
- ☒ b) Explains how work is performed in his/her own position to individuals in other positions performing the same or similar work (includes training replacement employees).
- ☒ c) Provides one-on-one specialized training to other individuals. Considered a specialist in a particular area or field of study. Positions at this level may be designated as the resident department expert.
- ☐ d) Provides one-on-one training to individuals in other positions. Must have a good understanding of the work of the other positions. Positions at this level may be designated as group leaders or work leaders.
- ☐ e) Conducts training seminars for groups. Training seminars are normally scheduled and follow a prescribed format. May also develop or assist in the development of training seminars.
7. DIRECTION EXERCISED
Check each description that applies.

☐ a) Not required to provide direction to other individuals.
☒ b) Assigns and/or checks work of other individuals.
☐ c) Schedules, assigns, and checks work of other individuals.
☐ d) In addition to C, establishes work priorities for a unit.
☐ e) In addition to C and D, guides project teams.

8. INTERNAL AND EXTERNAL CONTACTS
List internal and external contacts (i.e., specific positions within own department, other departments, students, faculty, on/off campus vendors, etc.), the duration of each contact (i.e. less than 1 hour at a time, 1-2 hours at a time, more than 2 hours at a time), and the frequency of each contact (i.e. occasional, frequent, or continuous).

<table>
<thead>
<tr>
<th>Type of Contact</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Services Physicians and Registered Nurses</td>
<td>&lt; 1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Physiotherapist</td>
<td>&lt; 1 hour</td>
<td>Occasional</td>
</tr>
<tr>
<td>Health Services Support Staff</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>Counsellors</td>
<td>&lt; 1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Manager, Health Finance</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>HCS Director</td>
<td>&lt; 1 hour</td>
<td>Occasional</td>
</tr>
<tr>
<td>SFU Students, Faculty and Staff</td>
<td>&lt; 1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Health and Counselling Services clients</td>
<td>&lt; 1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>SFU Financial Services</td>
<td>&lt; 1 hour</td>
<td>Occasional</td>
</tr>
<tr>
<td>External agencies staff, including but not limiting to:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Services Plan of BC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WorkSafe BC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance Corporation of BC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Third Party Insurance Companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laboratories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offices of specialists, therapists</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic Medical Records system vendor support</td>
<td>&lt; 1 hour</td>
<td>Occasional</td>
</tr>
</tbody>
</table>

9. IMPACT OF ERRORS
Common Errors: Provide a few examples of the most common errors which normally occur in the performance of the work.

- Claim errors including determining client’s MSP eligibility, mismatch in fee code and diagnostic code. Impact: Claim rejection and resubmission.
- Unable to obtain client signature on guard.me claim form in time for direct billing. Impact: Revenue loss.
9. IMPACT OF ERRORS

Common Errors: Provide a few examples of the most common errors which normally occur in the performance of the work.

Uncommon Errors: Provide a few examples of most uncommon errors which infrequently occur in the performance of the work.

- Missing MSP claim submission deadline. Impact: Revenue loss depending on nature of claim and client’s medical coverage.
- Omission in blacking out third party personal information for medical information disclosure. Impact: Privacy breach.

10. EFFORT

Describe concentrated periods of auditory (hearing/listening); visual (seeing); perceptual (understanding / comprehending); and physical dexterity (finger/hand movements, eye/hand coordination, lifting, carrying, pushing, pulling, reaching etc.). For each example of effort, indicate the concentrated duration (less than 1 hour at a time, 1-2 hours at a time, more than 2 hours at a time) and frequency (occasional, frequent, continuous).

<table>
<thead>
<tr>
<th>Type of Effort</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual - Working on video display terminal</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>Physical Dexterity - Data Entry/ Keyboarding</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>Perceptual - Detecting errors, Recognizing inconsistencies, reviewing documents, generating database queries and reports</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>Non-Confined sitting</td>
<td>1-2 hours</td>
<td>Frequent</td>
</tr>
<tr>
<td>Sorting and recording cheques and cash</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Auditory - Talking on phone, responding to enquiries</td>
<td>&lt;1 hour</td>
<td>Frequent</td>
</tr>
<tr>
<td>Lifting, Carrying</td>
<td>&lt;1 hour</td>
<td>Occasional</td>
</tr>
</tbody>
</table>

11. WORKING CONDITIONS

a) Describe the place(s) where work is performed such as office environment, laboratory, outside work site, etc. Also identify the number of hours (of the total hours worked per week) spent in the place(s).

<table>
<thead>
<tr>
<th>Location</th>
<th>Hours spent as a total of hours worked per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared office</td>
<td>30 / 35 hours</td>
</tr>
<tr>
<td>General office</td>
<td>5 / 35 hours</td>
</tr>
</tbody>
</table>
11. WORKING CONDITIONS

b) Describe any uncomfortable and/or distracting conditions in the workplace(s) which an incumbent is exposed to on a regular basis and the frequency of the exposure. (e.g. interruptions, distracting noise, unpleasant odours, dust, drafts, inks, dyes, cleaning agents, toner for printers, temperature extremes, heavy dust conditions, wetness, fumes, vibrations, etc.)

<table>
<thead>
<tr>
<th>Uncomfortable Conditions</th>
<th>Frequency of Exposure (Occasional, Frequent, or Continuous)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interruptions</td>
<td>Frequent</td>
</tr>
</tbody>
</table>

c) Describe any potential health or safety hazards etc. and the frequency of exposure of each hazard. (e.g. dealing with complaints and/or verbal/physical abuse; noise levels that interfere with normal speech/hearing; toxic gases or materials; dangerous chemicals, combustibles, radioactive material; repetitive arm, finger, wrist movements or other activities that may result in a physical injury; high speed, pressurized equipment; high voltage; heights above five feet; bio-hazardous wastes, body fluids, etc.)

<table>
<thead>
<tr>
<th>Potential Health or Safety Hazards</th>
<th>Frequency of Exposure (Occasional, Frequent, or Continuous)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verbal abuse from patients / dealing with complaints</td>
<td>Occasional</td>
</tr>
<tr>
<td>Contagious diseases</td>
<td>Frequent</td>
</tr>
</tbody>
</table>

12. CONTINUING EDUCATION

Check each description that applies.

☐ a) Does not require any continuing education.
☒ b) Requires learning new university/department related procedures and/or methods.
☒ c) Requires learning new procedures and/or methods acquired through reading non-university/department publications.
☒ d) In addition to B and C, requires registration in formal seminars, training sessions, workshops, conferences, etc.
☐ e) In addition to B, C, and D, requires registration in post-secondary courses (one semester/equivalent).

13. QUALIFICATIONS

Minimum required to satisfactorily perform the work.

Formal education qualifications: identify the highest level of formal schooling required.

High school graduation and general courses of moderate duration (one semester/equivalent), such as computerized word processing, spreadsheet and database applications, office procedures, bookkeeping.
13. QUALIFICATIONS
Minimum required to satisfactorily perform the work.

In addition to formal education, identify the certification or program of study required.

In addition to the above qualifications, the number of years of minimum experience are:

4 Years

Check one:

☒ An equivalent combination of formal education, certificate/program of study and experience is acceptable.
☐ An equivalent combination of education, certificate/program of study and experience is not acceptable because: (please explain)

Occupational Skills: Identify skills specifically required to perform the work of the position.

- 50 wpm keyboarding skills with a high degree of accuracy.
- Good knowledge of medical billing processes.
- Good knowledge of medical terminology.
- Good knowledge of current regulations regarding the Medical Services Plan (MSP), Freedom of Information & Protection of Privacy Act (FIPPA), Workers’ Compensation Board, ICBC and Out-of-Province billing guidelines and procedures.
- Basic knowledge of bookkeeping and accounting principles.
- Excellent organizational and problem solving skills.
- Excellent interpersonal, oral and written communication skills.
- Ability to exercise mature judgment and initiative.
- Ability to work with frequent interruptions.
- Ability to handle confidential/sensitive material with discretion.
- Ability to follow oral and written instructions.
- Ability to work independently and meet deadlines.
- Ability to add, subtract, multiply, and divide numbers with a high degree of accuracy
- Ability to use standard word processing, email, database, and spreadsheet applications (e.g., SFU Connect, Word, Excel, FileMaker) at an intermediate level
- Proficiency in using Electronic Medical Records system and medical billing module.

Occupational Requirement(s): Identify non-skill requirements to perform the work such as ability to work shifts and/or be on-call; ability to travel periodically outside the lower mainland; have a valid driver’s license; ability to lift, move or carry equipment or materials over 10 kg; etc.

- Some flexibility in time scheduling. Occasional overtime
- Some travel to Harbour Centre Health Services
- Must be bondable.