

POSITION DESCRIPTION

Department: Lake Chelan Health Clinics Title: Patient Access Associate	
Date Created: 11/15/2025 Next Review Date: 11/15/2027	Reports to: Practice Manager Approved by: <u>Marcus Miller</u> Marcus Miller (Dec 4, 2025 15:31:05 PST) (Administrative Dept. Signature)

POSITION STATUS: ☒ Hourly ☐ Salaried

POSITION SUMMARY

The Patient Access Associates primary function is to be responsible for initiating patient visits, coordinating patient appointments, collecting payments, entering/updating patient information on our electronic health record and providing courteous, efficient, and informal access to clinic services.

DUTIES & RESPONSIBILITIES

- Greet all patients and guests, either in person or on the phone, in a warm and friendly manner. Register patients; collect demographics and updates as needed; and assist with forms if necessary.
- Metrics as defined by clinic manager.
- Staff are expected to actively participate in Quality Improvement Initiatives. Improvement is an ongoing process, not a one-time effort.
- Schedules appointments for patients using scheduling protocols.
- Enters accurate data in the EHR, according to protocol.
- Obtains and verifies insurance information.
- Obtains and scans copies of insurance cards and ID.
- Collect waivers when necessary.
- Verifies eligibility at each visit.
- Collect and record payments from patients.
- Create patient estimates as requested.
- Maintain cleanliness of waiting room.
- Performs other duties assigned by clinic manager.
- Expected to be prepared to start shift at scheduled time, meet attendance standards, and work the hours necessary to perform the essential function of the job.
- Conforms to safety policies, general housekeeping practices.
- Demonstrates sound work ethics, flexible, and shows dedication to the position and the community.
- Demonstrated a positive attitude, is respectful, and possesses cultural awareness and sensitivity toward patients and co-workers.

- Expected to be able to read computer keyboard, monitor, and documents; prepare and analyze documents; read extensively; hear, recognize, and assess verbal presentations of patients; receive and convey detailed information orally, by phone and in person; convey accurate and detailed instructions by speaking to others in person and by phone.

QUALIFICATIONS

- Minimum of a High School Diploma.
- Two years of experience preferred.
- Strong organizational skills, attention to detail, must possess problem solving/reasoning skills, assess and evaluate various situations. Knowledge of federal and state regulations for health care plans. Ability to interpret and manipulate numbers, analyze, assess/evaluate, and exercise good judgment.
- Must demonstrate concern for accuracy and attention to detail.
- Must be CPR certified or the ability to obtain within 30 days of hire.
- Bilingual Spanish language preferred



Our Values

The Values at Lake Chelan Health provide fundamental guidance to all staff in creating an exemplary patient experience and a wonderful environment for staff to care for our community. The Values of Lake Chelan Health ensure we consistently meet our Mission: *To Provide the highest quality healthcare with compassion and respect to the community we serve.* The Values at Lake Chelan Health Support our just culture – one of an accountable organization, that develops strong systems, treats all staff with respect and equity, and encourages employees to take responsibility for their choices while reporting errors and system vulnerabilities. Our values guide the way we interact with our employees across all levels and disciplines – framing the way we interact with our patients.

Vision: To improve community health and make our region a better place to live.

Mission: To provide the highest quality healthcare with compassion and respect to the community we serve.

Values: Relationships, Integrity, Compassion, Respect, Excellence

Relationships

We hold relationships as a foundational value for all interactions. We seek first to understand in all relationships- patients, coworkers, and our community.

At Lake Chelan Health we will:

- Place the highest value on developing and maintain sincere relationships with those we interact with.
- Expect more from ourselves than we expect from others.
- Empower each other to carry out tasks and actions.
- Foster growth and improvement in our peers and our teams
- Include those closest to the problem when making decisions.
- Create a working environment that encourages working to the “top of one’s license”
- Seek to create a working environment that we enjoy, and patients trust.

Integrity

We demonstrate strong behavioral and ethical standards. We are accountable to our patients, our peers, and our community to these high standards in all our actions.

At Lake Chelan Health we will:

- Always do the right thing for our patients and their families.
- Work to earn the trust of those we serve.
- Communicate in an open and honest manner with the highest of ethical standards.
- Trust others while seeking, allowing, and expecting open and honest feedback.

Compassion

We treat every interaction with compassion, valuing every experience and story that our patients and their families bring with them. We seek to heal the whole person.

At Lake Chelan Health we will:

- Treat each patient, family, and caregivers with kindness and caring.
- Be respectful and understanding of the needs of our diverse community.
- Treat all of those we serve with humility, equity, and understanding.
- Provide care with grace and humanity.

Respect

We place a priority on equality and inclusion on a daily basis, honoring the dignity and worth of each individual.

At Lake Chelan Health we will:

- Honor our differences, regardless of issue.
- Celebrate the accomplishments of those we work with.
- Interact with humility and understanding.
- Be open minded and appreciate the perspectives and life experiences of all.
- Acknowledge and celebrate diversity in our community and our organization.
- Encourage transparency – encourage constructive identification of problems and take concerns directly to those involved.
- Communicate expectations clearly, dealing with content not assumptions.

Excellence

We demonstrate a full commitment to providing the highest level of quality and value in all aspects of our work, including operational, clinical, governance, financial, and relational.

At Lake Chelan Health we will:

- Expect quality and excellence for ourselves and those we interact with.
- Exemplify a just culture by focusing on improving systems – and treating staff equitably.
- Report errors, systems issues and provide solutions to improve, and not blame.
- Seek opportunities for continuous improvement in all our works.
- Use education and training as the foundation for improvement.

PHYSICAL REQUIREMENTS ANALYSIS

Department: Clinic

Job Title: Patient Access Associate

Mark all responses using the following codes:

N = Never

O = Occasionally, represents 1 to 33% or 1 to 2 hours of an 8-hour workday

F = Frequently, represents 34 to 66% or 2.5 to 5.5 hours of an 8-hour workday

C = Continuously, represents 67 to 100% or 6 to 8 hours of an 8-hour workday

N	O	F	C	PHYSICAL ACTIVITY
☐	☐	☒	☐	Walking
☐	☐	☐	☒	Sitting/Standing
☐	☒	☐	☐	Reaching: Shoulder Height
☐	☒	☐	☐	Above Shoulder Height
☐	☒	☐	☐	Below Shoulder Height
☐	☒	☐	☐	Climbing
☐	☒	☐	☐	Pulling/Pushing: 25 pounds or less
☒	☐	☐	☐	25-50 pounds
☒	☐	☐	☐	Over 50 pounds
☐	☒	☐	☐	Lifting: 25 pounds or less
☒	☐	☐	☐	25-50 pounds
☒	☐	☐	☐	Over 50 pounds
☐	☒	☐	☐	Carrying: 25 pounds or less
☒	☐	☐	☐	25-50 pounds
☒	☐	☐	☐	Over 50 pounds
☐	☒	☐	☐	Crawling/Kneeling
☐	☒	☐	☐	Bending/Stooping/Crouching
☐	☒	☐	☐	Twisting/Turning
☐	☒	☐	☐	Repetitive Movement

PHYSICAL EXPOSURE: (mark where applicable with "X")

☐ Unprotected heights

Harmful physical agents:

Lighting: ☒ Bright

☐ Heat/Cold

☐ Dim

☐ Noise

☐ Mechanical hazards

☐ Ionizing/non-ionizing radiation

☐ Hazardous substances

☒ Infectious diseases

ACCEPTABLE MINIMUM PHYSICAL ABILITY:

Vision:

☐ Good

☒ Correctable

☐ Blind

Color Vision:

☒ Normal

☐ Impaired

Hearing:

☒ Normal

☐ Moderate Loss

☐ Deaf

Manual Dexterity:

☒ Good

☐ Fair

Talking/Speech:

☒ Normal

☐ Moderate Loss

☐ Mute

DISCLAIMER STATEMENT

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of personnel so classified, nor do they address the performance standards that must be maintained.

EMPLOYEE:

I have read and understand the duties and responsibilities of this position. I have reviewed and agree to the contents of this position description, and I am able to perform the job functions and meet the physical requirements without restriction(s):

Employee Signature

Date

Job Description: Patient Access Associate (Clinic) Dec. 2025

Final Audit Report

2025-12-04

Created:	2025-12-04
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