POSITION TITLE: Client Care Coordinator

REPORTS TO: Front Office Manager---Day-to-Day Operation

CLASSIFICATION: Non-Exempt/hourly

FUNCTION: Performs Front Office Client Relations Operation

Duties

BASIC REPORTING RESPONSIBILITIES:

- Provide the Business Operations Director and Front Office Manager with new client intake and referral trends
- Provide the Business Operations Director and Front Office Manager Conversion rate (Referral to new evaluation appointment) issues and trends.
- Provide the Business Operations Director and Front Office Manager with client schedule issues or trends.

ESSENTIAL JOB FUNCTION:

To enhance the entire spectrum of the client experience through providing the best service possible from first contact through completion of services while overseeing client success throughout our proven process, the “EA Health Action Plan”

- Working with front office team to complete complex intake and client journey tasks per business office guidelines for your assigned team/s.
  - Complete the pre-visit conference to complete paperwork and basic orientation
  - Complete insurance verification and financial obligation confirmation
  - Schedule first visits
  - Communicate closely with patients, parents, caregivers, outside case managers, house staff, etc. to obtain needed information and communicate our policies.
  - Oversee success of entire cycle of care as directed by initial visit provider plans.
  - Schedule 3-month episodes from initial to progress visits to graduation (discharge)
  - Oversee each clients’ success following prescribed plan of care with show rates, addressing cancellations/no show according to policies and direct team management of this task.
• Provide communication to referral sources on status of visits, intake, and any other needed communications for best care.
• Manage assigned scheduling grids and care plan execution for OT, PT, Speech, Therapeutic Health Services and other programs and care providers.
• Assist with transportation issues with direct communication with clients and transportation companies
• Set up translation services for any client requiring language or hearing-impaired translation to be successful in plan of care
• Document all transactions in Electronic Medical Record.
• Utilize excellent phone etiquette.

Other front office duties as delegated by Office Manager, Director of Operations or Director of Clinical Services which may include:

• Provide Patient Service Functions
  • Manage all incoming calls and message distribution
  • Receive & document referrals
  • Manage Fax
  • Manage Plan of Care success
  • Schedule clients per care plans
  • Answer or redirect general billing or service questions/complaints
  • Accept, document and complete ‘requests for records’
  • Manage lobby cleanliness and assist waiting patients with needs

• Provide customer service
  • Schedule appointments for the CEO or other staff members
  • Route questions to appropriate staff members per phone interview

• Receive and document onsite and mailed payments from patients
  • Check Mail Daily – distribute accordingly
  • Verify daily totals
    • Cross check and validate cash & charge transactions in WebPT
    • Cross check payments received with payments posted in WebPT

• Assist with or complete bank deposit process
  • Verify checks received with amount posted on deposit slip
  • Verify cash received (cash & cash receipt slip) with amount posted
  • Verify total payments posted with deposit slip total
  • Coordinate Verification wit Business Operations Administrator or CEO
  • May make bank deposits

• Process requests for records per authorization and privacy guidelines
• Assist with the audit and reconciliation of third party or patient payments
  • Modify patient demographic or claim information if errors identified
  • Refile claims or statements as indicated
• Document and refer patient billing account problems to Business Operations Administrator

POSITION REQUIREMENTS:

• Strong Attention to detail—mathematical and data processing
• Data processing proficiency—Practice management software, Microsoft Word
• Strong ability to multitask
• Strong Communication skills—written, verbal and general interactive
• Friendly personality
• Assertive – Able to acknowledge need for assist and delegate tasks easily
• Self-motivating, understand duties and performs without daily instruction
• Organizational skills—Highly Organized. Enjoys spreadsheet organization, Able to follow things electronically, good priority setting, exceptional file maintenance & report generation

EDUCATION:

• Associates in Medical/Business Administration, Bachelor’s degree in business, Social Work, or health related degree.
• Basic computer courses or equivalent preparation

EXPERIENCE:

• Medical or business office front desk/case management desired

PHYSICAL DEMAND CAPACITY:

Consistent with published industry PDC norms or minimally:

• Sitting---routinely for 1-2 hours uninterrupted
• Lifting---occasionally light loads (5-10 pounds)
• Bending & reaching—routinely for office duties
• Walking—routinely to access other personnel, can use wheeled mobility
• Viewing monitor screen/using keyboard—routinely >1 hour duration

EXPOSURE DETERMINATION:

• Has the potential for Hazardous Substance Exposure due to work duties
• Has no potential for Bloodborne Pathogen Exposure due to work duties

HIPAA STATUS:

• Has been determined as eligible for access to/use of PHI & EPHI based on work duties and responsibilities in compliance with ‘minimal necessary’ standards
• All employees of the Exercisabilities, Inc will be compliant with all HIPPA/HITECH regulations within the scope of duties, including but not limited to management, administrative, financial and operational and/or support services.

• As an employee in this position, I may have access to Protected Health Information (PHI) which could be in oral, written, electronic, visual, pictorial, physical, or any in any other format or medium. I may only use and/or disclose information on a ‘minimum necessary’ basis and will do so in full compliance with the Exercisabilities, Inc HIPAA/HITECH policies and procedures. I acknowledge that I am subject to investigation and/or disciplinary action should I fail to comply as noted above.

The above statements are intended to describe the general nature and level of work performed in this position. They are not intended to be an exhaustive list of all responsibilities, duties and skills required.

APPROVED BY:

___________________________________              ________________
CEO/Executive Director                                        Date

My signature indicates that I understand and agree to fulfill the position description as reflected above and that I have been given the opportunity to discuss and request clarification of any duties and/or responsibilities noted.

___________________________________              ________________
Employee               Date