

JOB DESCRIPTION

Job Title: Client Intake Specialist
Agency: Saint Louis Counseling
Reports To: Office Manager
Approved: _____
Date: _____

<u>Office Use Only:</u>	
Grade: _____	_____
Job Code: _____	_____
EEO Code: _____	_____

POSITION SUMMARY

The Client Intake Specialist is responsible for creating a warm responsive interaction between our agency and clients. This position requires tact, sensitivity and professionalism with clients and families to guarantee their satisfaction and return. The Client Intake Specialist must be knowledgeable of internal processes and procedures to help the client schedule with the correct staff to assist them with their concerns. The intake specialist is the primary support for the clinical staff which involves both therapists and psychiatrists. This person provides and coordinates office services needed to operate an efficient office environment. The Client Intake Specialist has direct contact with our clients and patients.

DUTIES & RESPONSIBILITIES

The individual position involves the client intake responsibilities as well as additional administrative support duties for the office staff.

Duties include:

- Answering telephone requests for service, information, crisis calls and direct calls to and from Saint Louis Counseling.
- Greet Clients at check in, effectively collect co pays at time of visit, plus any deductibles.
- Gather insurance information from clients, call and verify insurance coverage with the insurance company.
- Verifies completion of all client/patient paperwork and reviews BIAS form, consent form and HIPPA consent form for required signatures.
- Entry of all accurate client data and paperwork (verification) information into Medtech.
- Maintain accurate scheduling, referral, and authorization information in the Medtech Billing system.
- Assist in client/patient checkout and schedule follow up appointments.
- Print out schedules, batch reports, and super bills daily for clients/patients who are scheduled for appointments.
- Maintain monthly bills for office; authorize check requisitions for payment and/or credit refunds.
- Process release of record requests, typing letter w/notice of required payment.

- Perform prescription authorizations for medication requests for doctors.
- Assist with Psychiatric medication refills and answering pharmacy questions regarding medications.
- Stay updated on any issues involving the County Grants.
- Maintain archive records storage and filing to maintain order of workspace.
- Miscellaneous support; typing letters, spreadsheets and investigations into matters.
- Back-up any other support personnel when needed for vacation and/or sick days.
- Work Saturdays as need
- Attend staff meetings.

KNOWLEDGE & EXPERIENCE REQUIREMENTS

- Knowledgeable of office machines and management practices. Ability to type with accuracy.
- Good Oral communication skills to relate to clients including a pleasant phone voice to communicate accurately.
- Possess strong organizational skills in order to multi-task many duties at one time.
- Reception experience either in medical setting or counseling environment is helpful.
- Experience with crisis calls and clients.

SKILLS & ATTITUDES REQUIRED FOR SUCCESS IN JOB

- Ability to interact with a range of people in an open, friendly and customer oriented manner.
- Knowledge of computer software programs.
- Need to be perceptive about the caller and be able to ask questions if they are not sure what the caller’s intent might be toward themselves or someone else.
- Possess organizational skills, multi-task and have a “can do” attitude.

RELATIONSHIPS REQUIREMENTS

This position is very people oriented as you are dealing directly with the clients. The applicant must be someone who is warm, bonds easily with clients and has boundaries that help them to remain at a professional distance while accomplishing the task for helping the person to obtain services with the agency.

Works closely with psychiatrists and therapists on a daily basis to ensure patient/client scheduling and satisfaction. Maintain an open rapport with other Saint Louis Counseling office personnel.

RESOURCES FOR WHICH ACCOUNTABLE

Comparison of computer systems: Medtech and Outlook.

