

**WESTERN WAYNE FAMILY HEALTH CENTERS POSITION DESCRIPTION**

Site: Corporate

Revised Date: 11/3/17

**Position Description:** Customer Service Representative - Medical**Reports To:** Office Manager**FLSA Status:** Hourly, Non-Exempt**Direct Reports:** None

**Purpose:** The Customer Service Representative (CSR) is responsible for a variety of office tasks necessary to provide medical services at WWFHC. These tasks include, but are not limited to: appointment scheduling, patient intake, fee calculation and collection, electronic and manual filing, accurate chart preparation and updating, maintaining and balancing a cash drawer, insurance enrollment and verification, applying appropriate codes, checking out patients, answering phone calls, and other duties as assigned by supervisor.

**PART I: ESSENTIAL POSITION FUNCTION AND DUTIES**

1. Required to be in their assigned work area at all times except for designated breaks or lunch.
2. Welcomes and greets guests in a timely fashion and notifies the appropriate staff of the guest's request.
3. Welcomes and greets patients, completes the check-in and intake process in a timely matter.
4. Must monitor lobby area a minimum of every 30 minutes to ensure all visitors have been served.
5. Answer telephone calls in a timely and professional manner and complete the caller's request and if unable to do so, find someone who is able to do so.
6. Answer patient questions and address complaints, and when necessary request supervisory or management support.
7. Daily and constant monitoring that all providers' schedules meet required protocols. Correct errors as needed.
8. Schedule and/or reschedule all appointments in conjunction with approved protocol for calls and walk-ins.
9. Make patient calls for range of purposes, including but not limited to confirmation of appointment, no-show appointment, change of insurance status, and reminder calls.
10. Register new patients with thorough and complete entries of all demographic, insurance/income assessment information.
11. Update current patient accounts with change of address, phone number, demographics, insurance/PCP/location, sliding fee info, Consent for Care form, patient portal, pharmacy, and reason for visit.
12. Verifies patient's insurance and assigns sliding fee designation where appropriate.
13. Distributes required forms such as PHQ-9 adults, ASQ children, survey to patients, physical, PHQ-9 Adolescent, and any others as designated.
14. Provide assistance in completing applications for insurance coverage (Healthy Michigan Plan or Marketplace), food assistance, and changing Primary Care Providers.
15. Follow up on HMP or Marketplace applications submitted or in process.
16. Processes cash, checks and/ or credit card payments in-person and over the phone.
17. Reconcile payments daily, run end of the day report and balances cash drawer. (Deposit payments in safe daily)
18. Work on daily task sheet to be used as verification and measure of volume of tasks completed per day.
19. Performs all clerical duties to support the clinic's daily operations
20. Require to check emails daily at least 3 times a day (morning, noon, and afternoon) and reply as appropriate.
21. Maintains workstation and front desk area organized at all times. Ensure lobby is presentable at all times.
22. Responsible for maintaining all front desk forms adequately stocked at all times. These must be legible and current.
23. Monitor office supplies inventory and request replenish as needed.
24. Receive mail, packages etc. and distribute them.
25. Performs other duties as assigned.

**PART II: CLINIC WIDE RESPONSIBILITIES****1. Customer Relations:**

- a. Treats guests, patients, physicians, and other employees with care, courtesy, and respect.
- b. Responds quickly and appropriately to customer request.
- c. Looks for and suggests ways to better meet customer needs.
- d. Answers clinic communications systems promptly and with courtesy and respect.

**2. Teamwork:**

- a. Works cooperatively within own department and other areas.
- b. Willingly accepts additional responsibility – tries to make others job easier.
- c. Responds quickly to request for assistance.
- d. Required to work closely with patients and associates.
- e. Interacts with other departments on problem issues.
- f. Accepts feedback from patients, visitors, clinic employees, physicians and general public.

**3. Continuous Improvement:**

- a. Continuously looks for and suggests ways to improve.
- b. Effectively completes assignment to achieve the greatest benefits at acceptable cost.
- c. Implements improvements as appropriate.
- d. Demonstrates interest in own growth and development by:
  - i. Periodically evaluating own performance.
  - ii. Demonstrating an awareness of personal abilities and limitations.
  - iii. Independently seeking means to make improvements.
- e. Attends and participates in in-services and continuing education programs
- f. Attends departmental meetings.

**4. Communications:**

- a. Keeps appropriate people informed.
- b. Speaks and writes clearly, concisely, and appropriately for need.
- c. Listens carefully.
- d. Communicates tactfully.
- e. Understands that all confidentiality and privacy considerations are respected and fostered at work and off duty.

**5. Self –Management:**

- a. Presents a positive image of Western Wayne Family Health Center at all times.
- b. Carries out assignments with little need for direction.
- c. Timeliness.
- d. Maintains confidentiality.
- e. Provides proper notification of absence and tardiness.
- f. Works weekends and shifts when necessary.

**PART III: EDUCATION, EXPERIENCE**

1. High School Diploma or equivalent.
2. One (1) year experience in a clinic or medical office preferred.
3. One (1) year experience working with an electronic medical record system, preferred.

**PART IV: KNOWLEDGE, SKILLS AND ABILITIES**

1. Knowledge of general medical language and procedures.
2. Knowledge of multiple insurance plans and government programs.
3. Experience with widely used computer software i.e., Microsoft Office, Outlook and healthcare software.
4. Skilled at providing excellent and focused customer service.
5. Capable of working in a complex work environment, without requiring constant supervision.
6. Ability to maintain confidentiality at all times and maintain organizationally appropriate relationships.
7. Knowledge of organization policies and procedures.
8. Skilled in exercising initiative, appropriate judgment, problem-solving and decision making.
9. Skilled in developing and maintaining effective relationships with patients and customers.

**Working Conditions**

Jobs are located in federally qualified health facility.  
Exposure to diseases and illnesses may be inherent in the work

**Physical Requirements**

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of the job.

While performing the duties of this job, the employee is regularly required to sit and stand; use hands to manipulate objects, tools or controls; reach with hands and arms; and talk and hear. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception and the ability to adjust focus. Noise level in the work environment is usually quiet.