

## Berks Counseling Center – Job Description

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<b>Position Title:</b>	<b>CLIENT SERVICES REPRESENTATIVE</b>	<b>Classification:</b>	<b>N8</b>
<b>Department:</b>	<b>SUPPORT</b>	<b>FLSA Status:</b>	<b>NON-EXEMPT</b>
<b>Accountability:</b>	<b>LEAD CLIENT SERVICES REPRESENTATIVE</b>	<b>Status:</b>	<b>FULL-TIME or PART-TIME</b>
<b>Primary Location:</b>	<b>BCC</b>	<b>Creation/Revision Date:</b>	<b>MARCH 2020</b>

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### General Summary

Perform routine clerical and administrative functions including check-in and check-out of clients, scheduling and confirming client appointments, collection of cash receipts, organizing and maintaining paper and electronic files, completing and processing initial intake paperwork, and providing information to callers.

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### Minimum Qualifications

High school diploma or equivalent plus one (1) year office experience in healthcare field or Medical Secretary/Medical Billing certificate required. Flexibility with hours, including evenings required. Excellent communication skills required. Excellent attention to detail required. Verbal communication in both Spanish and English preferred. Customer service experience preferred.

To perform this position successfully, an individual must be able to perform each essential function satisfactorily. The requirements are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made.

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### Knowledge, Skills, and Abilities

- Knowledge of BCC services, policies and procedures
  - Knowledge of Electronic Health Records – ability to navigate and utilize electronic health records
  - Knowledge of Electronic Verification System
  - Skill in operation of telephone systems and telephone etiquette according to company standards
  - Skill in using Microsoft Office and Microsoft Outlook and the ability to learn new software programs that support project efforts
  - Skill in active listening – giving full attention to what others are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times
  - Skill in time management – managing one’s own time and establishing priorities in relation to the tasks at hand
  - Skill in social perceptiveness – being sensitive of other’s reactions and understanding why they react as they do
  - Ability to be organized and prioritize based on the daily requirements
  - Ability to communicate information and ideas effectively so others will understand
  - Ability to work as a team player – the ability to be optimistic in tough situations share responsibility for problems, support decisions, and work well with others
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### Essential Job Functions

1. Ensure all appointments are entered correctly into the EHR system.
2. Check-in clients and notify the proper provider via phone and IM in a timely matter.
3. Check-out clients by adding the appointment in the proper provider schedule along with any other services the provider may request.

4. Complete verification of benefits for all clients prior to rendering of services.
5. Email all information to the proper provider and/or staff member of any changes in insurance coverage and update profile on our EHR system.
6. Monitor schedule for scheduling errors, such as but not limited to, incorrect provider, multiple services same day, and insurance restrictions which may apply.
7. Assure accurate client insurance information and attach all supportive documentation into the patient dashboard in the EHR system. Verify and update insurance information as warranted.
8. Create a patient dashboard and assure all patient information is accurate. Enter all relevant client information into the EHR System.
9. Create, maintain and update all logs, including (but not limited to) Open Admission Log, Referral Log, and Individual Cash Receipts Log.
10. Maintain a high level of customer service and professionalism both in dealing with the public and within the organization.
11. Properly navigate received telephone calls to the appropriate staff member.
12. Distribute any incoming fax, mail and any other delivered packages to the appropriate staff member on a timely matter.
13. Assist in opening and closing of Agency when appropriate.
14. Perform all other related duties and responsibilities as assigned.

**Physical Requirements**

- SEEING: Must be able to see well enough to read reports and use computer.
- COMMUNICATING: Must be able to communicate well enough to clients, vendors and coworkers.
- MOBILITY: Must have mobility to move about the agency.
- LIFTING/PULLING/PUSHING: Must be able to lift up to 15 pounds.
- OTHER: Must be able to write, type and use technology.

**Note:** The statements herein are intended to describe the general nature and level of work being performed, but are not to be seen as a complete list of responsibilities, duties, and skills required of personnel so classified. Also, they do not establish a contract for employment and are subject to change at the discretion of Berks Counseling Center. Berks Counseling Center is an equal opportunity employer.

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**CLIENT SERVICES REPRESENTATIVE – Signature / Date**

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**LEAD CLIENT SERVICES REPRESENTATIVE – Signature / Date**

\_\_\_\_\_  
**PRINTED NAME**

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**PRINTED NAME**