



MENTAL HEALTH CUSTOMER SERVICE REPRESENTATIVE

REVIEWED 07/2024

REPORTS TO:	Clinic Lead/Manager
REVISED:	02/2014, 09/2021, 07/2024
	See current organizational chart for oversight/administrative support information

PRIMARY FUNCTION:

Responsible for ADVANCING EXCEPTIONAL CARE by conducting timely admissions for all patients in a professional manner in accordance with the philosophy, goals and objectives of Clarinda Regional Health Center. Responsible for providing indirect patient care through coordination of clinic communications, performance of clerical and reception duties, requisitioning of supplies, equipment and services as directed. Accurately schedules patient appointments and performance of tasks as directed by clinic personnel. Participates in performance improvement activities, and maintains regulatory agency requirements, nursing and hospital policies, procedures, and standards.

QUALIFICATIONS:

Education and/or Experience

- High school diploma or equivalent preferred
- Basic Computer knowledge preferred
- Previous office experience preferred

Certificates, Licensure, Registrations

- For job-specific certifications refer to the [Education Certification Requirements by Job Category: Non-Clinical Staff](#)

Essential Job Duties and Responsibilities	
1.	<p>Maintains and demonstrates current working knowledge of established policies and procedures and carries out all operational processes of Admissions in an accurate and efficient manner.</p> <ul style="list-style-type: none"> • Pre-admits and admits patients by gathering all insurance and demographic information. • Verifies insurance through eligibility verification. • Explains the consent to treat form and all other paperwork associated with the admission to the patient at the time they are signing the admissions paperwork. • Scans copies of insurance cards, driver’s licenses, etc. to assist in processing of claims once admissions and patient’s visit is completed. • Updates addresses and various patient information to keep the computer database as up to date as possible.

Essential Job Duties and Responsibilities	
	<ul style="list-style-type: none"> • Collects copays and payments or directs private pay customers to the Financial Service Representative for setting up a payment plan.
2.	<p>Performs account creation and registration tasks in accordance with established policies to obtain complete and accurate demographic and insurance information.</p> <ul style="list-style-type: none"> • Reviews registration follow-up reports for Patient/Guarantor Information and Insurance Information. • Scans report for errors and makes corrections in the computer. • Monitors census edits and makes corrections as needed.
3.	<p>Provides support in the areas of admissions, patient account services, customer service, and answers incoming telephone calls and manages patient appointments.</p> <ul style="list-style-type: none"> • Schedules clinic appointments. • Schedules follow-up appointments after sessions. • Provides information to all customers by phone, pagers or other communication media. • Answers telephone calls and related questions in a professional manner.
4.	<p>Communicates Effectively</p> <ul style="list-style-type: none"> • Communicates effectively with other health team members and departments regarding patient situations, satisfaction needs, and other requirements as needed. • Answers telephone in a polite, prompt and courteous manner and communicates information to appropriate personnel. • Gives the best possible first impression by greeting all patients, visitors, guests and employees with a warm and friendly welcome, whether on the phone or in person. • Returns phone calls promptly when necessary.
5.	<p>Performs various support responsibilities for the clinic.</p> <ul style="list-style-type: none"> • Coordinates mail and package pick up • Reports equipment malfunctions or breakdowns to the supervisor or appropriate department. • Facilitates appropriate handling of medical records and maintains confidentiality of patient and employee information. • Orients new personnel, as appropriate, and gives feedback. • Assists with ordering supplies.

	Essential Job Duties and Responsibilities

6.	<p>Promotes and ensures patient and employee safety in performance of all responsibilities.</p> <ul style="list-style-type: none"> • Works within scope of practice. • Performs skills and duties assigned competently. • Utilizes proper body mechanics, lifting techniques, and appropriate equipment to minimize risk and injury to self. • Proactively identifies safety concerns surrounding the work environment. • Supports and abides by all CRHC departmental and safety policies and procedures.
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7.	<p>Participates in CRHC'S Quality program, committees, performance and quality improvement initiatives, and activities which support the facility and department operations.</p> <ul style="list-style-type: none"> • Demonstrates a commitment to the practices of Quality Improvement (QI). • Regularly attends Department huddles • Completes tasks as outlined on Department Huddle Board.
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8.	Performs other duties as assigned.
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ESSENTIAL WORK ENVIRONMENT & PHYSICAL REQUIREMENTS:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

(check appropriate column or enter maximum individual lifting requirement)

Physical Activity	Not Applicable	Occasionally (0-35% of day)	Frequent (36-66% of day)	Continuous (67-100% of day)
Sitting				X
Standing		X		
Walking		X		
Climbing	X			
Driving	X			
Lifting (floor to waist level)		40 lbs.	25 lbs.	5 lbs.
Lifting (waist level and above)		40 lbs.	25 lbs.	5 lbs.
Lifting (shoulder level and above)		40 lbs.	25 lbs.	5 lbs.
Carrying objects			X	
Push/pull		30 lbs.	20 lbs.	10 lbs.
Twisting		X		
Bending		X		
Reaching forward			X	
Reaching overhead		X		
Squat/kneel/crawl	X			
Wrist position deviation				X
Pinching/fine motor activities				X
Keyboard use/repetitive motion				X
Taste	X			
Talk				X



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Smell	X			
Sensory Requirements	Not Applicable	Accurate 20/40	Very Accurate 20/20	
Near Vision		X		
Far Vision		X		
	Not Applicable	Yes	No	
Color Discrimination			X	
	Not Applicable	Accurate	Minimal	Moderate
Depth Perception		X		
Hearing		X		

Environment Requirements	Not Anticipated	Reasonably Anticipated
<i>Occupational Exposure Risk Potential</i>		
Bloodborne Pathogens	X	
Chemical	X	
Airborne Communicable Disease	X	
Extreme Temperatures	X	
Radiation	X	
Uneven Surfaces or Elevations	X	
Extreme Noise Levels	X	
Dust/Particulate Matter		X
Other (List)		

Shift Requirements	8 hrs/day	10 hrs/day	12 hrs/day	Other (varied)
Usual workday hours	X	X		



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	Not Applicable	Yes	No
Regular, punctual attendance for assigned shifts		X	
Available to work overtime		X	



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ESSENTIAL FUNCTION FORM

In compliance with the Americans with Disabilities Act, we are requesting that you read the job description and answer the following question. If you would like assistance with this process, please ask Human Resources.

Can you perform the essential functions of the position with or without reasonable accommodations?

YES

NO

Name (please print): _____

Signature: _____ Date: _____