

Job Description

Department: Support Staff

Job Title: Intake/Records Specialist

Reports to: Director of Clinical Coordination

Job Purpose: The Intake/Records Specialist is responsible for providing general office support by receiving incoming medical records, sending outgoing medical records, electronically filing medical records in the clients chart, electronically scanning all client documents and assisting with new patient intake paperwork.

Essential Duties and Responsibilities:

- Meet with all new clients to obtain insurance information, assess for sliding fee scale eligibility, complete and have client sign appropriate releases and verify eligibility.
- Educate new clients on SMHC services and policies.
- Schedule appointments for recommended services with appropriate providers.
- Review options with clients who are uninsured or underinsured.
- Assist clients with applying for Presumptive Eligibility when appropriate.
- Make internal and external referrals as needed.
- Enter new client insurance information into the electronic medical record.
- Work with existing clients to complete and update financial/insurance information.
- Electronically scan and file all incoming and outgoing documents and medical records into the client charts under the appropriate category.
- Receive dictation on hospitalized clients and retrieve information from hospital portals; scan and file documents associated with hospitalization.

Additional Duties and Responsibilities:

- Accomplish all tasks as appropriately assigned or requested.

Competencies:

- Social Skills—the individual professionally interacts with employees and clients and models a positive teamwork attitude.
- Problem solving—the individual identifies and resolves problems in a timely manner and gathers and analyzes information skillfully.
- Oral communication—the individual speaks clearly and persuasively in positive or negative situations.
- Written communication—the individual edits work for spelling and grammar, presents data effectively and is able to read and interpret written information.

- Leadership—the individual inspires and motivates others to perform well, accepts feedback from others.
- Quality management—the individual looks for ways to improve and promote quality and demonstrates accuracy and thoroughness.
- Judgment—the individual displays willingness to make decisions, exhibits sound, accurate, and ethical judgment and makes timely decisions.
- Planning/organizing—the individual prioritizes and plans work activities, uses time efficiently and develops realistic action plans.
- Safety and security—the individual observes safety and security procedures and uses equipment and materials properly.
- Interpersonal skills—the individual maintains confidentiality, remains open to others' ideas and exhibits willingness to try new things.

Experience and Education:

Required:

- High School diploma or GED
- Previous customer service experience
- Previous insurance experience

Preferred:

- Previous medical records experience
- Knowledge and experience working with mental illness
- Knowledge of community resources

This job description is not intended to be all-inclusive and does not constitute a written or implied contract of employment. The employee will be expected to perform other reasonably related duties as assigned by the immediate supervisor and / or other management personnel.