

Patient Services Team Member

Job Description



Position Title: Patient Services Team Member

Reports to: Practice Manager

Job Status: Full-Time

FLSA Status: Non-Exempt

Positions Supervised: None

Position Summary: Professionally and courteously greet and assist patients and visitors in person or on the phone to provide each patient and visitor an excellent healthcare experience. Check in patients, obtain necessary demographic and insurance information, respond to inquiries, provide office information and perform general administrative tasks.

Essential Functions:

To accomplish this job successfully, an individual must be able to perform, with or without reasonable accommodation, each essential function satisfactorily. Reasonable accommodations may be made to help enable qualified individuals with disabilities to perform the essential functions.

- Greet patients and visitors in a positive and helpful manner. Determine the nature and purpose of their visit and direct or instruct them accordingly.
- Ability to communicate clearly in person and on the phone and establish/maintain cooperative relationships with patients, families, physicians, staff and management.
- Provide necessary forms to patients for completion and signature. Review all forms for completeness and accuracy.
- Verify, enter, update and correct patient demographics, HIPAA contacts and expiration dates, guarantors and insurance subscriber demographics including date of birth, gender and relationship of subscriber to patient in the electronic medical record.
- Consistently and accurately obtain demographics to comply with meaningful use guidelines including patient race, ethnicity and language.
- Verify patient insurance eligibility. Scan current insurance cards and accurately enter insurance information into computer system. Scan current driver's license if applicable.
- Obtain insurance referrals as needed.
- Collect cash, check and credit card payments for co-payments and balance payments. Provide receipts for all payments. Balance cash drawer, prepare deposit and maintain deposit log daily.
- Copy, fax and mail documents and information.
- Scan and link documents in patient records via EMR.
- Answer phones, schedule appointments, take concise messages and enter messages electronically, submit e-refill requests in a manner consistent to CHP policy.
- Establish and maintain effective working relationships with patients, providers, team members, insurance companies and the public. Work with peers and providers in a team environment.

- Fulfill organizational responsibilities as assigned which may include: respecting/promoting patient's rights; responding appropriately to emergency situations; sharing problems relating to patients and/or staff with practice manager quickly. Provide safe patient centered, compassionate, and competent care.
- Ability to interact with diverse groups.
- Participate in Continuous Quality Improvement projects in the practice.
- Required to attend all scheduled monthly meetings.
- May be required to work at another CHP location dependent on staffing needs.
- Perform all other duties as assigned.

Competencies:

- Accuracy – Ability to perform work accurately and thoroughly.
- Communication – Ability to communicate effectively verbally and in writing.
- Computer Skills – Proficient ability to use a computer and electronic medical record.
- Confidentiality – Maintain patient, team member and employer confidentiality. Comply with all HIPAA regulations.
- Customer Service Oriented – Friendly, cheerful and helpful to patients and others. Ability to meet patients and others needs while following office policies and procedures.
- Detail Oriented – Ability to pay attention to the minute details of a project or task.
- Flexibility – Ability to adapt easily to changing conditions and work responsibilities.
- Multi Task – Ability to handle more than one task at the same time.
- Positivity – Display a positive attitude and is a positive agent for change.
- Teamwork – Work as part of a team and collaborate with co-workers.
- Working Under Pressure – Ability to complete assigned tasks under stressful situations.

Education and Experience:

- High school diploma or equivalent required
- Associate's Degree or higher preferred
- Medical Front Office or administrative experience preferred

Certification and Licensure:

- None required

Work Environment:

- Environmentally controlled medical office environment
- Fast paced environment with occasional high pressure situations
- Frequent interaction with a diverse population including team members, providers, patients, insurance companies and other members of the public

Physical Demands:

- Frequent sitting, writing, typing, grasping and speaking
- Occasional standing, walking, reaching, bending, stooping, lifting and carrying
- Lifting, carrying, pushing and pulling up to 25 pounds
- Frequent use of computer, keyboard, copy and fax machine and phone

CHP has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the team member's ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills and abilities. Additional functions and requirements may be assigned by supervisors, managers, directors or officers as deemed appropriate.

This document does not represent a contract of employment, and CHP reserves the right to change this job description and/or assign tasks for the team member to perform, as CHP may deem appropriate.

Team Member Signature: _____

Date: _____

Revision Dates: 1/2016, 1/2023, 2/2024