



## Job Description

**Job Title:** Client Financial Services Assistant      **Division:** Admin - Client Financial Services  
**Supervisor**  
**Created:** 2014-04-01      **Amended:** 2015-09-16  
**Job Code:** 10-04      **Role:** Admin      **Function:** Support      **Wage & Hour Status:** Exempt

<b>Employee Name:</b>	<b>Dept Name/RU:</b>
	9907-99
<b>Supervisor:</b>	<b>Positions Supervised:</b>
CFS Supervisor	Billing Maximization Specialist

### POSITION SUMMARY

Assist CFS Supervisor in managing the day-to-day functions of the billing department. Ensure accurate, complete billing information submission in order to receive revenue to support LMC services.

**Expected to maintain a performance evaluation score of 3 or greater on each measured item.**

To perform this job, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### MINIMUM QUALIFICATIONS (required for an interview)

- High school graduate or equivalent
- Detailed/Hands-On knowledge of 837 files and posting 835's
- Have flexibility, personal integrity, the ability to function independently, and to work effectively and tactfully with personnel, insurance representatives, clients, their families, and outside organizations
- Familiar with HIPAA guidelines/regulations
- Knowledge of insurance CPT and HCPCS codes with ability to integrate reimbursement rule changes into a organizations reimbursement processes
- Knowledge of general billing accounting procedures
- Two years of supervisory and three years of total experience in association with third party billing preferred
- Knowledge and experience in the behavioral health field preferred but not required
- Experience in Medicare, Medicaid, third party billing preferred
- All employees are required to have basic computer skills. These basic skills will include knowledge of creating folders, saving and retrieving files, e-mail (Outlook), MS Office (Word and Excel), using web browsers such as Internet Explorer and/or Mozilla Firefox, along with operating a keyboard, mouse, and printer.
- Meet minimum standards for screening of mental health personnel as contained in F.S. 394.4572

### WAGE & PRODUCTIVITY MINIMUM

- \$25,000 annual pay

## POSITION COMPETENCIES

### *Direct Responsibilities*

- Assume total management responsibility of Client Financial Services in the absence of the CFS Supervisor.
- Implement procedures designed for increased efficiency (i.e. standardization) as directed by CFS Supervisor.
- Identify and resolve client billing complaints which cannot be resolved at CFS Specialist level.
- Manage and supervise the work product of the Billing Maximization Specialist.
- Evaluate CFS Billing Maximization Specialist performance, identify, document, and develop corrective action plans for personnel performance problems.
- Prepare and/or run monthly and annual reports for internal and external use within Life Management Center and any action which may be required.

### *Shared Responsibilities with CFS Supervisor*

- Assist with the management of the day-to-day functions of the billing department which will include submitting claims, posting payments, preparing deposit, mail run, requesting refunds, submitting Medicare crossovers, collections, etc.
- Assist each position of the department for quality and efficiency, making changes where needed.
- Assure compliance with third party billing requirements (including Medicare and Medicaid) before submission of claims and timely submission of those claims.
- Follow up on claim denials and unpaid claims on all billing payers if they cannot be resolved by the CFS Insurance Specialist or the CFS Medicaid Billing Specialist.
- Assist Supervisor with changes in system, including billing matrixes, payers, services types, 837 set up and 835 set up, as directed.
- Correct, adjust, balance, and audit clients' accounts and review collections paperwork if applicable.
- Review and enter write offs into the system.
- Provide staff training and development.
- Assure staff compliance with Life Management Center's policies and procedures.
- Review with CFS Supervisor written policies and procedures that govern the functions of the department, as needed.
- Maintain strictest confidentiality; adhere to all HIPAA guidelines/regulations.
- Participate in liaison activities with outside organizations and activities of staff, program and Center development.

## CORE ORGANIZATIONAL VALUES

*It is the mission of LMC to provide comprehensive, integrated care that promotes the health and quality of life of our community members.*

### *V. Competency: Supports LMC's mission, values, and standards*

#### *1. Maintain agency and program standards for documentation and EHR*

- Complete documentation within 24 hours of service occurrence.
- Complete documentation in an accurate and intelligible manner.

- Perform client related documentation in accordance with LMC policies and procedures, component specific guidelines, Medicaid and other third party requirements and contract provisions as applicable.

## *2. Adapt to changing requirements for service delivery*

- Respond quickly to changes in work requirements.
- Show flexibility in changing of schedule as needed.
- Be willing to take on additional responsibilities as requested.

## *3. Demonstrate initiative and self-reliance in the performance of job duties*

- Use good judgment in bringing issues to the attention of supervisor without depending on continuous input or deferring decisions.
- Work with cost consciousness.
- Participate in opportunities for program and Center development.
- Organize tasks, manage time well, and direct oneself.

## *4. Exhibit professional accountability*

- Refer to and follow Center Policies & Procedures.
- Perform job tasks in a manner that does not result in audit or monitoring problems.
- Provides appropriate notice for absences and late arrivals, and is not chronically absent or late.
- Accurately reports all hours worked on electronic time sheet by appropriate due date.

## *5. Maintain and enhance job skills*

- Respond to opportunities and requirements for skill development.
- Demonstrate openness to input on work issues from coworkers and supervisor.
- Participate/Provide peer consultation/training.

## *6. Maintain productivity set by program/organization*

- Maintain a work-focused atmosphere; share techniques for increasing productivity.
- Perform duties in a manner that expedites the work of other staff.
- Manage time, adhere to deadlines, and prioritize tasks.

## *7. Comply with LMC safety policies and procedures*

- Report potential safety hazards on company property or in business execution.
- Obtain and give consultation in matters related to safety/risk management.
- Use good judgment in matters of safety and liability for which there is no prescribed procedure.
- Complete & submit Incident Reports according to written guidelines and procedures.

## *8. Exhibit professionalism and ethics*

- Observe Center standards for ethical conduct.
- Observe professional standards for ethical conduct.
- Use Center resources for intended purposes.

- Respect the property and rights of coworkers.
- Submit accurate documentation for work done and reimbursement requested.

#### 9. *Protect client and co-worker confidentiality*

- Follow established federal, state, and LMC guidelines on confidentiality.
- Access records only where the “need to know” exists.
- Shares information only where the “need to know” exists.
- Conversations are conducted with privacy in mind (phone conversations conducted with discretion, information is not discussed in public areas, etc.).

#### 10. *Work effectively with Center staff, clients, and business associates*

- Communicate effectively with others using the spoken word.
- Appreciate and be sensitive to the feelings of others.
- Demonstrate tact, courtesy, and helpfulness in relating to community agencies, coworkers, clients, and other associates.
- Coordinate & communicate effectively with others.
- Respond to problems and conflict with solution-focused thinking.
- Work effectively with people regardless of race, color, religion, gender, age, citizenship, marital status, disability, or national origin.

#### 11. *Demonstrate sensitivity to persons of varying backgrounds and needs*

- Attend to client needs in a thorough and timely manner.
- Speak of and to clients with dignity & respect.
- Be attuned to the presence of trauma indicators and project safety and trust in relating.
- Demonstrate client satisfaction (positive responses to client satisfaction surveys, minimal client requests to change counselor, an absence of warranted complaints, etc.)

### PROGRAM SPECIFIC FUNCTIONS (can add up to 5 maximum unit specific functions)

Click here to access program specific functions, if needed:

### PHYSICAL REQUIREMENTS (physical demands of job)

- Must be able to hear conversational speech, visually observe client behaviors for safety and communicate effectively with clients and co-workers
- Vision requirements include close and distance vision

Activity	Expectation			
Standing	<input type="checkbox"/> Minimal	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Frequent	<input type="checkbox"/> None
Sitting	<input type="checkbox"/> Minimal	<input type="checkbox"/> Moderate	<input checked="" type="checkbox"/> Frequent	<input type="checkbox"/> None
Driving vehicles	<input type="checkbox"/> Minimal	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Frequent	<input type="checkbox"/> None
Lifting and/or Carrying	<input checked="" type="checkbox"/> Minimal	<input type="checkbox"/> Moderate	<input type="checkbox"/> Frequent	<input type="checkbox"/> None
Bending and/or Stooping	<input checked="" type="checkbox"/> Minimal	<input type="checkbox"/> Moderate	<input type="checkbox"/> Frequent	<input type="checkbox"/> None
Climbing Stairs and/or Ladders	<input checked="" type="checkbox"/> Minimal	<input type="checkbox"/> Moderate	<input type="checkbox"/> Frequent	<input type="checkbox"/> None
Walking or Moving (between offices,	<input type="checkbox"/> Minimal	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/> Frequent	<input type="checkbox"/> None

other facilities, etc.)	
Other (lift above waist/reaching etc., please explain)	<input type="checkbox"/> Minimal <input type="checkbox"/> Moderate <input type="checkbox"/> Frequent

Speaking:	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Hearing:	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Reading Comprehension:	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Repetitive motion with hands, wrists, arms (e.g keyboard, typing, handwriting, etc.)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

Ability to lift and carry up to 15 pounds.

Ability to handle stressful situations:    ☐ Minimal    ☐ Moderate    ☒ Frequent

	Infrequent	Occasional	Frequent	N/A*
Travel Same Day	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel Overnight	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overtime (Non-Exempt only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Holidays/Weekends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Shift Work (PMs/Midnights)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

\* Not Anticipated

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### POSITION TRAINING REQUIREMENTS

1. Center-wide New Employee Orientation
2. Mandatory annual training
- 3.

### TEAM PARTICIPATION (committees/teams in which the employee is expected to participate)

1. List mandatory teams here, if applicable

### EMPLOYEE SIGNED ACKNOWLEDGEMENT OF RECEIPT OF JOB DESCRIPTION

My signature below represents that I have read and understand my responsibilities as a Client Financial Services Assistant Supervisor and that I am able to perform the essential functions of this position.

Employee Signature	Date
Supervisor Signature	Date

Employee Name: