



**Job Title:** Eligibility Specialist  
**Department:** Patient Accounts  
**Supervisor:** Director of Patient Accounts  
**FLSA Status:** Non-Exempt  
**Approved Date:** 1-1-18

### **Position Summary**

Responsible for timely and accurate verification of patient's insurance and entering that information into the Practice Management System prior to the patients' visit. The primary focus is the accuracy and timeliness of patient insurance verification and data entry to ensure accurate collection of balances, co-payments, co-insurance, and deductibles for multiple locations in the organization.

### **Essential Duties and Responsibilities** include the following. Other duties may be assigned.

1. Obtains patient eligibility and benefits via portal, electronic inquiries, and/or phone or interactive voice response (IVR) calls.
2. Completes all verifications for scheduled patients 72 hours prior to the visit.
3. Adds/Updates, as needed, insurance information including appropriate co-payments due in the organizations practice management system.
4. Notes pertinent information in the system regarding patient's insurance and balances that are required for the check-in process.
5. Understands all types of insurance that CHCW is contracted with.
6. Understands specific policy regarding BHC and OMT visits; and restrictions.
7. Follows up with patients on denied insurance verifications prior to the visit.
8. Works closely with Front Desk Supervisors to make sure that all co-payments and co-insurance amounts are collected timely.
9. Works closely with Patient Financial Counselors regarding self-pay patients.
10. Works with the Patient Accounts Supervisor and the Director of Patient Accounts on insurance contracts and eligibility issues, as they arise.
11. Handles a high-volume work load, prioritizes multiple demands, and organizes with detail and accuracy.
12. Takes inbound patient calls and addresses needs in a timely and thorough manner.
13. Maintains accurate and complete documentation of all contacts.

## **Competencies**

To perform the job successfully, the following competencies should be demonstrated.

**Attendance/Punctuality** - Is consistently at work and on time, as established; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time.

**CHCW Culture** - Treats people with respect; keeps commitments; inspires the trust of others; works with integrity and principles; upholds organizational values; follows policies and procedures; supports organization's goals and values; shows respect and sensitivity for cultural differences; follows instructions; responds to management direction; takes responsibility for own actions; keeps commitments; commits to long hours of work when necessary to reach goals; completes tasks on time or notifies appropriate person with an alternate plan; asks for and offers help when needed.

**Communications** - Speaks clearly and persuasively in positive or negative situations; listens and gets clarification; responds well to questions; demonstrates group presentation skills; participates in meetings; writes clearly and informatively; edits work for spelling and grammar; keeps others adequately informed; selects and uses appropriate communication methods.

**Customer Service for Internal and External Customers/Patients** - Manages difficult or emotional customer/patient situations; responds promptly to customer/patient needs; solicits customer/patient feedback to improve service ; responds to requests for service and assistance; meets commitments.

**Job Knowledge** - Competent in required job skills and knowledge; exhibits ability to learn and apply new skills; keeps abreast of current developments; requires minimal supervision; displays understanding of how job relates to others; maintains confidentiality per policy and regulations; fluent in Microsoft Office programs, including Word, Excel, PowerPoint and Outlook and job related software and computers; uses resources effectively; pursues training and development opportunities; adapts to new technologies; keeps technical skills up to date.

**Problem Solving** - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; works well in group problem solving situations; uses reason even when dealing with emotional topics; adapts to changes in the work environment; changes approach or method to best fit the situation.

**Planning/Organizing** - Prioritizes and plans work activities; uses time efficiently; plans for additional resources; sets goals and objectives; develops realistic action plans.

**Quality Management** - Looks for ways to improve and promote quality; demonstrates accuracy and thoroughness; applies feedback to improve performance; monitors own work to ensure quality.

**Safety and Security** - Observes safety and security procedures; determines appropriate action beyond guidelines; reports potentially unsafe conditions; uses equipment and materials properly.

**Teamwork** - Exhibits objectivity and openness to others' views; gives and welcomes feedback; establishes and maintains effective relations; exhibits tact and consideration; offers assistance and support to co-workers; works cooperatively in group situations; works actively to resolve conflicts.

**Qualifications**

To perform this job successfully, 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.

**Education and/or Experience**

High School Diploma or general education degree (GED) and two years of medical reception or insurance eligibility experience and/or training; or equivalent combination of education and experience.

**Certificates, Licenses, Registrations**

None required at this time.

**Bilingual**

Bilingual in Spanish/English is required. Bilingual test must be passed at the level required for the position.

**Physical Demands**

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.

While performing the duties of this Job, the employee is regularly required to use hands to finger, handle, or feel and talk or hear. The employee is frequently required to reach with hands and arms. The employee is occasionally required to stand; walk and sit. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

**Work Environment**

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.

The noise level in the work environment is usually moderate.

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Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee Print Name

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date