



<b>Job title</b>	<i>Intake Specialist</i>
<b>Reports to</b>	<i>Program Data Manager</i>
<b>Fair Labor Standards Status</b>	<i>Non-Exempt</i>

### **Job purpose**

Reporting to the Program Data Manager, the Intake Specialist is the initial point of contact to all Penfield families, creating client charts and processing documentation that requires physician signatures.

### **Working relationships**

Agency Staff  
Families  
Volunteers  
Community professionals  
General public  
Insurance Companies  
Physicians  
Clinics

### **Prime functions**

#### *Answer and make phone calls:*

- Answer incoming phone calls as the first level of contact for all Penfield Children's Center services.
- Make client calls as follow up on all referrals received through fax, phone or CCSB assignment
- Determine client eligibility for programs based on information obtained via conversation with potential client
- Have a high level of knowledge regarding all Penfield programs

#### *Enter client information into electronic medical records system:*

- Enter information on new clients into the electronic medical records system. Information will be gathered from faxes, CCSB referral, client phone calls and other means.
- Ensure client information is entered properly through the intake process for program staff to track information, enter encounters and complete notes.
- Look up (Forward Health) and enter insurance information for each client

#### *Process Physician Orders, Evaluations, Plans of Care and Discharge Reports*

- *Document (Account Disclosure) and send all physician orders, evaluations, plans of care and discharge reports*
- Complete necessary follow up calls/faxes/emails
- Note receipt of physician signed documentation
- Complete required steps for placing children on/off hold

#### *Clinical Records:*

- Maintain confidentiality of all Protected Health Information (PHI), according to HIPAA regulations.
- Upload documentation into client charts

#### *Assist the Agency as needed:*

- Provide backup duties as needed to the Agency Access Desk
- All other duties as assigned
- Encouraged to volunteer 4 hours of time per year to a Penfield activity

#### *Demonstrate Penfield's Core Values:*

- LEAD WITH LOVE

We welcome everyone with compassion and empathy; patience and kindness. To lead with love, we look for the best in our co-workers, our families, and ourselves.

- GROW WITH US

We celebrate our successes and learn from our mistakes. We believe there is always a better way asking questions that challenge the status quo, improve our process and make our work easier. Grow with us allows us to focus on how we can improve ourselves and, in the process, better serve the children and families in our care.

- BETTER TOGETHER

Together, we can do amazing things. Children and families trust us and depend on us to work as a team to meet their needs. We are better together when we maximize our strengths, the gifts of our colleagues and the commitment of our amazing partners.

- DO WHAT IT TAKES

We are determined, motivated and adaptable. We solve problems. We own our work, our actions and our behaviors. We step up to help our co-workers, partners and our families. We do what it takes to get the job done right and done well.

- BE PRESENT

We bring our best genuine self to everything we do. Being present allows us to bring our passion and commitment to our work to ensure the best possible outcomes for Penfield.

#### *Qualifications*

- Excellent organizational skills and attention to detail
- Excellent oral communication skills. Effective Phone skills.
- Prior experience processing medical billing and/or authorizations highly preferred
- High School Graduate or GED
- Knowledge of Microsoft Office (primarily Excel and Word), Internet and ability to learn Billing software.
- High level of confidentiality and business ethics.
- Able to work at a computer station for extended periods of time.
- Ability to work well independently or as a member of a team.
- Actively demonstrates a commitment to understanding and advancing diversity, equity and inclusion efforts.
- Understands, exhibits and promotes the Penfield Core Values.
- Manual dexterity required for typing on a computer keyboard
- Ability to lift or move objects of 25 lbs. or less
- Visual acuity (close vision, distance vision and ability to adjust focus)
- Meeting vaccine standards as outlined in the Bloodborne Pathogens Exposure Control Plan and COVID 19 Vaccine Policy.

## Core Values

- **Lead with Love** - We welcome everyone with compassion and empathy; patience and kindness. To lead with love, we look for the best in our co-workers, our families, and ourselves.
- **Grow with Us** - We celebrate our successes and learn from our mistakes. We believe there is always a better way asking questions that challenge the status quo, improve our process and make our work easier. Grow with us allows us to focus on how we can improve ourselves and, in the process, better serve the children and families in our care.
- **Better Together** - Together, we can do amazing things. Children and families trust us and depend on us to work as a team to meet their needs. We are better together when we maximize our strengths, the gifts of our colleagues and the commitment of our amazing partners.
- **Do What it Takes** - We are determined, motivated and adaptable. We solve problems. We own our work, our actions and our behaviors. We step up to help our co-workers, partners and our families. We do what it takes to get the job done right and done well.
- **Be Present** - We bring our best genuine self to everything we do. Being present allows us to bring our passion and commitment to our work to ensure the best possible outcomes for Penfield.

## What we Do

- We communicate effectively, give feedback honestly and receive it with an open mind
- We use data and processes to drive decisions
- We celebrate success and learn from our mistakes
- We work to find balance in our personal and professional life
- We provide the same care and compassion to our colleagues and ourselves that we share everyday with the people we serve

Penfield Children's Center is an Equal Opportunity Employer.