

Position Title: Client Navigator Intake Specialist

Department: Intake

Reports to: Intake Specialist Supervisor

Client Navigators review, organize, and manage the process for new product placement for durable medical equipment in the home environment. Client Navigators work with and supports sales to ensure compliance and timely product deliveries as well as engaging with patients, caregivers, referral sources and payers daily.

Duties:

- Begins Intake processing by reviewing records and documentation from the referral and ensures all information is entered into Brightree correctly.
- Performs insurance verification and enters product order into billing system (Brightree).
- Obtains additional data from the field or referral source as needed.
- Manages and maintains proper and timely notes in Brightree for each order.
- Communicates order status with Therapy Consultant, Referral Source and patient as needed.
- Creates Practitioner Note for each pending order.
- Generates delivery tickets to technicians. Uploads all documents to Brightree and closes out the patients order upon delivery confirmation.
- Follows clinical and compliance guidelines to maximize reimbursement and minimize potential loss or denials.
- Identifies new potential contract opportunities with payer partners
- Provides excellent customer service to all incoming callers.
- Works on additional projects as given them by their supervisor/Team Lead.

Skills & Talents:

- Knowledgeable of medical terminology used for medical billing.
- Can perform basic math calculations.
- Ability to maintain patient confidentiality and follow HIPAA requirements, Medicare, Ethos and compliance standards, policies and procedures.
- Able to communicate verbally and in written correspondence in clear, concise, complete and respectful manner. Uses proper grammar and punctuation and is free of spelling errors and slang.
- Able to organize work and set priorities to meet deadlines.
- Works cooperatively with others.
- Develops positive and supportive relationships with Therapy Consultants and Field Service personnel.
- Ability to work with minimal supervision and with extensive detail.
- Capable of learning new computer software packages.

Experience & Education:

- Self-Starter
- Extremely organized and detail oriented.
- Desire to learn new skills.
- Work experience in customer service, healthcare/medical office setting for minimum one year.
- Experience working with standard computer applications. (i.e., Outlook, Microsoft WORD and EXCEL, etc.).
- Working knowledge of health insurance verification and third-party billing business model.

Physical Requirements:

- Must be able to remain in a stationary position for extended periods of time
- Ability to sit or stand for extended periods of time
- Constantly operates a computer and other office productivity machinery, such as a copy machine and computer printer
- Ability to travel occasionally by car or commercial flight

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Date:

Employee Name:

Employee Signature: