



Position Title: Intake Specialist I

Position Summary: The Intake Specialist is responsible for taking all new client calls, conducting phone interviews of potential clients regarding their appropriateness for services, and scheduling new clients according to client needs. The Intake Specialist is also responsible for verifying benefits and following up with clients once benefits have been verified (if necessary), and completing financial assessments with clients for those who qualify for financial assistance. The Intake Specialist will also be expected to handle various types of intakes to support all agency programs, verify insurance benefits, and work with a variety of software programs. This position will be evaluated annually. Evening and weekend hours may be required.

Qualifications:

Education: High School Graduate required, Bachelor’s Degree in the health and human services field preferred

License: None required, LSW preferred

Experience: 1-3 years of previous experience working in a medical setting, previous office and computerized billing experience, previous experience working with the mental health population

Skills: The ability to work well with others in a fast-paced environment and with a high degree of organization.

Performance Requirements:

- Uphold and follow the agency core values of integrity, empowerment, inclusivity and innovation in all aspects of the position.
- Create a welcoming, respectful, and safe environment.
- Share ideas and concerns in a constructive and respectful manner.
- Follow rules and requirements of all federal, state, local, and accrediting bodies.
- Maintain accurate client database which includes entering client call data, tracking and scheduling.
- Verifying client benefits, entering benefit info into database and completing appropriate agency documentation
- Take all new client calls and schedule with appropriate therapist based on need, preference, and insurance
- Perform new client interviews to assist clients with filling out paperwork.
- Maintain a calm, kind demeanor with clients both in person and on the phone.
- Willingness to be cross trained in various aspects of intake.
- High degree of accuracy.

Other Duties: Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

Classification: Non-exempt

Hours Required: Variable

Location: Variable

Supervised by: Intake Department Coordinator

Employee Signature

Date