

**TITLE OF POSITION:** INTAKE CUSTOMER SERVICE REPRESENTATIVE  
**CLASSIFICATION:** NON-EXEMPT  
**RESPONSIBLE TO:** INTAKE MANAGER  
**EFFECTIVE DATE:** 1/22/2018  
**LIFTING REQUIREMENTS:** UP TO 50 POUNDS

### **GENERAL DESCRIPTION**

Under the supervision of the Intake Manager, the Intake Customer Service Representative (ICSR) performs a variety of high-level customer service and clerical coordination functions to facilitate support of the overall operations of the Intake Department. The Intake Customer Service Representative (ICSR) identifies potential enrollees to PACE (Bienvivir) as well as manages the completion of the Visitor's application process to include: financial, medical, SASO applications and submission of these documents to the State of Texas or other state administrative agencies on a timely manner.

### **RESPONSIBILITIES**

1. Schedules Home Visits for applicants requesting to become potential enrollees in the PACE program and maintains the monthly Home Visit schedule in the Customer Relationship Management (CRM) system; adjusts schedule as necessary.
2. Telephonically screens applicants by assessing appropriateness with regards to catchment areas, eligibility requirements, and promptly responds to telephone inquiries from individuals seeking information about the PACE (Bienvivir) program.
3. Works in coordination with other members of the Intake Team (Intake Coordinators, Intake Manager, Medicaid Eligibility workers) and clinical operations team (RN, Social Worker, Physician, Medical Records) during the enrollment process to initiate and help facilitate the financial and medical applications for all potential enrollees
4. Communicates with the Health and Human Service Commission (HHSC) Medicaid Eligibility (ME) Worker(s) as needed to establish an applicant's financial eligibility.
5. Works in conjunction and provides additional information to state administrative agencies (TMHP, ME Worker, HHSC) regarding potential enrollees and communicates any pending denials as needed.
6. Provides support to Intake Department personnel as needed to include the Intake Manager, Medical Necessity-Level of Care (MN-LOC) Registered Nurse, and Intake Coordinators.
7. Ensures that potential enrollee's Intake data collection tools are maintained, current, and in compliance with PACE requirements and Bienvivir policy.
8. Participates in weekly Intake Department meetings as well as joint Intake/Marketing meetings; communicates relevant information to staff as needed.
9. Maintains and provides appropriate Intake process documentation for both internal and external reporting purposes as required.
10. Communicates issues related to the enrollment process to the Intake Manager on a timely basis.
11. Other tasks and responsibilities as assigned by the Intake Manager.

**MINIMUM QUALIFICATIONS**

**I. EDUCATION/EXPERIENCE**

- a. High school graduate required.
- b. One year of experience working with the elderly population.
- c. One year of experience providing departmental clerical support.
- d. Prior experience working sales; utilizing a Customer Relationship Management (CRM) system preferred.

**II. KNOWLEDGE/SKILLS/ABILITIES**

- a. A dependable individual with abilities to prioritize, be goal oriented, organize work, multitask, and manage time efficiently.
- b. Must possess a keen understanding and appreciation of the elderly.
- c. Adaptable individual with ability to work as a member of a team.
- d. Ability to communicate (both orally and written) effectively with staff, visitors and family members.
- e. The ability to accept supervision.
- f. Ability to handle confidential information appropriately.
- g. Bilingual (fluent in English and Spanish)
- h. Possess excellent computer skills (MS Office Suite).
- i. Professional and effective telephonic communication skills.
- j. Ability to work under stress with strict deadlines.

**Bienvivir All-Inclusive Senior Health reserves the right to amend job descriptions and work hours as required by the program.**

EMPLOYEE STATUS:            Full Time \_\_\_\_\_            Part Time \_\_\_\_\_            Temporary \_\_\_\_\_

EMPLOYEE SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_