

**LIFE MANAGEMENT CENTER OF NORTHWEST FLORIDA, INC.  
JOB DESCRIPTION**

**DATE ESTABLISHED:** 10/05/09  
**DATE AMENDED:** 7/27/2022

**TITLE OF POSITION:** Financial Specialist

**POSITION NUMBER:** 19-02

**PROGRAM:** Access Center

**SUMMARY:** The responsibility of this employee is to ensure financial accuracy of client records on a daily basis and to provide guidance on the optimal payor source through verifying insurance eligibility and benefits and covered/in network providers, providing guidance to uninsured clients to seek possibility of other payors, ensuring accuracy of demographics and financial information, and communicating and interfacing with the billing department and programs to promote an environment conducive for data integrity. This employee is also responsible for ensuring all clients that would like tele-health services are sent forms to complete virtually as well as scheduling once virtual forms are returned to employee. Employee must be able to serve as back up for front desk if needed.

**MINIMUM REQUIREMENTS:** High School graduate or equivalent. Excellent knowledge of medical insurance payors, including Medicare and Florida Medicaid. Minimum of 2 years working experience, including verification of insurance eligibility and benefits and obtaining pre-authorizations. Computer knowledge a must with working experience in Microsoft Word, Excel, and Outlook. Ability to multi-task while maintaining the highest level of client service. Ability to work independently with little supervision. Possess strong attention to detail and organization.

Compliance with minimum standards for screening of mental health personnel as contained in F.S. 394.4572.

Life Management Center maintains and enforces a drug-free workplace policy. Applicants are required to be drug tested prior to employment. Under certain circumstances, employees may also be required to submit to drug and/or alcohol testing. Information on the Drug-Free Workplace Policy is contained in the employee Handbook and set forth in the Drug-Free Workplace Policy, available through the Human Resources Department and the organization's website at [www.lmccares.org](http://www.lmccares.org)

**SUPERVISED BY:** Access Center Office Manager

**POSOTIONS SUPERVISED:** None

**WAGE AND HOUR STATUS:** NON-EXEMPT

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**DESCRIPTION OF DUTIES AND RESPONSIBILITIES<sup>1</sup>:**

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<sup>1</sup> Expectations regarding quality and quantity of work are further delineated in the criteria-based performance appraisal.

**ESSENTIAL FUNCTIONS:** (Essential functions of this position are listed below. The position also includes additional functions as needed and/or assigned by supervisor.)

#### Third Party Payors: New Clients

1. Verify third party insurance coverage benefits, deductibles, co-pays and insurance networks.
2. Obtain pre-authorization, if required.
3. Enter benefits, deductibles, co-pays and authorizations in client's financial eligibility.
4. Verify accuracy of all information previously entered by client registration.
5. Call client to discuss option of in office appointments verses tele-health appointments.
  - a. If tele-health apointmenis chosen employee will take steps to send forms virtually for client to complete and return. Once forms are returned employee will call to schedule tele-health appointment.
6. .
7. .
8. Emphasize that payment is required at time of services and ensure client has a clear understanding of and agreement to payment.

#### Third Party Payors: Established Clients

1. Receive insurance changes from programs.
2. Verify benefits, deductibles, and co-pays for new insurance.
3. Obtain pre-authorizations if new insurance requires.
4. Enter new information into financial eligibility.
5. Ensure appointment made by program is with covered/in network provider with new insurance, and if not, re-schedule the appointment or instruct the client to contact his/her member services for a covered provider.
6. Notify client of benefits and payments expected under the new insurance.

#### Self-pay Clients:

1. Verify household income and family size to determine client's ability to pay.
2. Enter correct self-pay guarantor in client's financial eligibility.
3. Explain financial obligations to client emphasizing amount of payment for each service and the requirement of payment at time of services.
4. Ensure client has a clear understanding of his/her obligations.
5. Explain services may be refused if payment is not made at time of services.
6. Obtain financial agreement for fees.
7. If verification of income is not provided by client, explain to client appointment cannot be made until information is brought in.
8. Provide guidance for uninsured clients who may meet the criteria for benefits under programs such as TANF, Medicare, Medicaid, Healthy Kids, etc. through research and client counseling and providing resource packets. Objective: To reduce number of self-pay clients.
9. Meet with established clients when income has changed to verify income, enter new guarantor in financial eligibility, and determine fees for services.

#### General:

1. Ensure all required demographics, financial, and authorization data is collected, verified, and inputted correctly.
2. Notify programs of payment requirements via tag lines/alerts.

3. Communicate and interface with programs and billing department to ensure collections and billing are running smoothly.

**NON-ESSENTIAL FUNCTIONS:** List other functions that are typically shared with other employees of that could, if necessary be performed by coworkers.)

**Physical Requirements:**

| Activity  | Expectation                                 |  |  |
|---|---|--|--|
| Standing  | <input type="checkbox"/> Minimal            | <input checked="" type="checkbox"/> Moderate | <input type="checkbox"/> Frequent            |
| <input checked="" type="checkbox"/> Sitting                 | <input type="checkbox"/> Minimal            | <input type="checkbox"/> Moderate            | <input checked="" type="checkbox"/> Frequent |
| <input checked="" type="checkbox"/> Driving vehicles        | <input checked="" type="checkbox"/> Minimal | <input type="checkbox"/> Moderate            | <input type="checkbox"/> Frequent            |
| Lifting and/or Carrying                                     | <input type="checkbox"/> Minimal            | <input checked="" type="checkbox"/> Moderate | <input type="checkbox"/> Frequent            |
| Bending and/or Stooping                                     | <input type="checkbox"/> Minimal            | <input checked="" type="checkbox"/> Moderate | <input type="checkbox"/> Frequent            |
| Climbing Stairs and/or Ladders                              | <input checked="" type="checkbox"/> Minimal | <input type="checkbox"/> Moderate            | <input type="checkbox"/> Frequent            |
| Walking or Moving (between offices, other facilities, etc.) | <input type="checkbox"/> Minimal            | <input type="checkbox"/> Moderate            | <input checked="" type="checkbox"/> Frequent |
| Other (lift above waist/reaching etc., please explain)      | <input type="checkbox"/> Minimal            | <input checked="" type="checkbox"/> Moderate | <input type="checkbox"/> Frequent            |

- Speaking: Yes  No  
 Hearing: Yes  No  
 Reading Comprehension: Yes  No  
 Repetitive motion with hands, wrists, arms (e.g keyboard, typing, handwriting, etc.) Yes  No

Ability to lift and carry up to 25 pounds.  
 Ability to handle stressful situations:  Minimal  Moderate  Frequent

|                            | Infrequent                          | Occasional               | Frequent                 | N/A*                     |
|----------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| Travel Same Day            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Travel Overnight           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Overtime (Non-Exempt only) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Holidays/Weekends          | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Shift Work (PMs/Midnights) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

\* Not Anticipated

**Copy received by:**

\_\_\_\_\_ **Date** \_\_\_\_\_