

## **FINANCIAL SERVICES REPRESENTATIVE - CSR**

### **MAJOR FUNCTION**

This is an entry level technical position whose function is to provide customer service to members of the general public in matters related to billing questions and complaints.

### **ESSENTIAL FUNCTIONS**

The following statements describe the principal functions of this job and its scope of responsibility, but should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including working in other functional areas to cover absences or relief, to equalize peak work periods, or otherwise to balance the work load.

- Answers phones and requests for service, resolve patient inquiries, issue statements, forward other calls to appropriate members.
- Review/verification of claims received after medical necessity has been determined in order to verify claims for accuracy prior to the billing of the claims.
- Update database with information regarding calls; classify calls by type and follow up to document additional information received. Issue additional forms, form letters, authorizations, and other items in response to customer issues.
- Process records requests, determine request validity, and ensure that records are duplicated and distributed in keeping with internal policy and regulatory requirements.
- Maintains customer accounts and files on a daily basis. Ensure that work is carried out in compliance with all policy and regulatory requirements.
- Required to report to work at the appointed hour, as scheduled, and to work the entire assigned schedule.

### **SECONDARY FUNCTIONS**

- Performs other duties as assigned.
- Perform or assist with any duties or operations, as required to maintain workflow and to meet schedules and quality requirements.

### **CUSTOMER SERVICE**

This is a front-line position for providing excellent customer service to members of the general public and other County employees. Personal contact occurs with other employees of the unit, employees of other departments in the County, citizens, and customers of the department. Service is provided in person, by mail, and by telephone contact.

### **SUPERVISION**

This position has no supervisory responsibility.

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### **EDUCATION, EXPERIENCE, LICENSES, CERTIFICATIONS**

#### **Education and Experience**

High school diploma or general education degree (GED); and one year experience in customer service; medical billing experience; with demonstrated general office and computer skills; and cash drawer and cash balancing experience; or comparable training, education, or experience may be substituted for the above minimum qualifications.

#### **Licenses**

Valid Florida Driver License.

### **JOB SKILLS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements are representative of the required knowledge, skills, and abilities.

#### **Language Skills**

- Ability to read, analyze, and interpret financial reports.
- Ability to respond to common inquiries or complaints from customers or members of the business community.

#### **Mathematical Skills**

- Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.
- Ability to compute rate, ratio, and percent.
- Ability to calculate discounts, interest, proportions and percentages.

#### **Problem Solving Ability**

- Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions.
- Ability to deal with problems involving a few concrete variables in standardized situations.
- Requires some judgment in selection of procedures, methods, or tools, equipment to own work to accomplish tasks.

#### **Specialized Skills and Abilities**

- Knowledge of business English and spelling.

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- Ability to enter and retrieve information on the computer.
- Ability to communicate tactfully and courteously with members of the public.
- Knowledge of office practices and procedures. Knowledge of various filing systems.
- Ability to review run reports for proper coding.
- Knowledge of HIPAA requirements.
- Ability to cross train for other tasks.
- Ability to remain calm in stressful situations.
- Ability to take a teamwork approach to the job by cooperating with others, offering to help others when needed, and considering larger organization or team goals rather than individual concerns. Includes the ability to build a constructive team spirit where team members are committed to the goals and objectives of the team.

### **Machines and Equipment**

This employee will be required to operate a computer, calculator, telephone, fax machine, copy machine, and other general office equipment in the completion of the tasks of the position.

### **PHYSICAL DEMANDS**

While performing the duties of this job, the employee will frequently be required to stand, walk, sit, use hands to finger, handle or feel, talk or hear, and will occasionally be asked to lift up to 25 pounds. Vision requirements are close, distance, color, and peripheral vision, and the ability to adjust focus.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. While performing the duties of this job, the employee will occasionally be exposed to moving mechanical parts and airborne diseases and illnesses in working with the public. The typical noise level is moderate.

Established: 10/2008

Pay grade: 5

Job Description Number: 6213  
03/2012

Category: 5

Status: NE

Revised: