

# JOB DESCRIPTION



**POSITION: CUSTOMER SERVICE REPRESENTATIVE**

Reports to: **Practice Manager**

Approved: Sept. 28, 2000

Revised: June 30, 2013; April 7, 2015; April 26, 2016;  
June 21, 2017; Nov. 7, 2018; May 21, 2020;  
January 25, 2022; October 23, 2023

Department: **Support Staff**

FLSA: **Non-exempt**

**Basic Function:** Provides Customer/Patient service to all patients of CHC facilities. Responsible for performing a variety of clerical duties relating to the day-to-day operations of the front office. Greet patients in a professional, friendly, hospitable manner. Updating and organizing of information in the patients' charts. Responding to inquiries and requests from staff personnel.

## **Essential Functions:**

1. Maintain professionalism and excellent customer service at all times with patients, caregivers, and other staff.
2. Speak clearly, distinctly and professionally on telephone and face to face patient encounters.
3. Answer a multiline telephone in a professional manner.
4. Maintenance task relating to EPM appointment scheduling.
5. Maintenance task relating to EHR Telephone Template.
6. Maintain open communication with other clinic staff to ensure appropriate patient flow.
7. Work as a team player and be willing to assist co-workers in other duties within his/her capabilities, to aid the clinic team in providing good, efficient patient care.
8. Maintenance tasks relating to the EPM/EHR system to ensure accuracy and current data; including UDS and insurance/financial information.
9. Handle registration and check out of patients at the reception desk.
10. Maintenance tasks relating to chart accuracy and current chart data.
11. Collection of co-payments, deductibles and patient balances as appropriate. Have general understanding of financial programs available.
12. Work with support staff to ensure appropriate patient flow.
13. Appropriately code daily charge slips as needed. Ensure that all charge tickets are completed, including provider signature as needed for self-pay patients.
14. Answer the telephone in a professional manner; direct calls to appropriate individuals and/or document messages as required in EHR.
15. Stock all front office machines on a daily basis; fax, copier, and printers.
16. Fax and photocopy information as needed.
17. Prepare front office for opening/closing of business.
18. Close out cash drawer nightly. Reconcile monies. Prepare deposit slip. Lock securely for evening.
19. Direct all uninsured and underinsured patients to Patient Financial Services.
20. Maintaining daily batch scanning in Document Management for patient charts.
21. Mail daily no show appointment letters.
22. Complete reminder appointment phone calls on a daily basis.
23. Complies with CHC Standards of Conduct, Code of Conduct and Corporate Compliance.

### **Secondary Functions:**

1. Understands role in Disaster plan and that safety is a condition of employment.
2. Follows CHC's policies and procedures.
3. Serves on various CHC and community committees as required/requested.
4. Attends meetings, seminars, and conferences as appropriate to ensure skills and knowledge remains current.
5. Using PPE as appropriate.
6. Other duties as assigned.

### **Minimum Qualifications:**

1. Ability to perform each essential function duty satisfactorily with or without reasonable accommodation. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
2. High School Diploma or equivalency
3. Moderate computer skills required with emphasis on accuracy.
4. Ability to read, write and speak English.
5. Ability to meet, communicate and work well with patients. Ability to understand medical terminology. Ability to work with physicians, mid-level providers, clinical support staff, administrative staff and front office staff.
6. Ability to handle problem areas and issues and make decisions as required/appropriate. Ability to work independently with little supervision. Ability to work under stress. Must have good organizational skills.
7. Must be flexible and willing to work evening/overtime/weekends if required/requested.
8. Must maintain skills necessary to safely and efficiently operate the following equipment and machines used in the performance of the job: telephone, fax machine, photocopier, personal computer, and calculator.
9. Good interpersonal and human relations skills are required. Must possess skills to empathize and care for a variety of patients, including low-income and diverse cultures and treat everyone (internal and external customers) with respect and dignity.
10. Ability to maintain confidentiality at all times in all situations and follow the laws and intent of the most current HIPAA laws and regulations and Canyonlands' security and privacy policies.

### **Preferred Qualifications:**

1. Two (2) plus years of directly related experience.
2. Bi-lingual (English/Spanish/Navajo) language skills.
3. Knowledge of Microsoft programs with the ability to effectively communicate using Outlook.

### **Appearance Standards:**

This position shall follow the appearance standards as outlined in Canyonlands' Personnel Policy "*Personal Appearance*".

**Physical Requirements:**

Office Staff - All Levels				
	Not Applicable	Occasionally	Frequently	Constantly
Stand		X		
Vision - near				X
Vision – w/assistance				X
Walk		X		
Sit				X
Handling				X
Reach outward			X	
Reach above shoulder			X	
Climb	X			
Crawl	X			
Squat/kneel		X		
Bend		X		
<b>Lift/Carry</b>				
10 lbs or less		X		
11-20 lbs		X		
21-50 lbs		X		
51-100 lbs		X		
Over 100 lbs	X			
<b>Push/Pull</b>				
12 lbs or less		X		
13-25 lbs		X		
26-40 lbs		X		
41-100 lbs	X			
Not applicable	Activity does not apply to this position			
Occasionally	Position requires this activity up to 33% of the time (0-2.5 hrs per day)			
Frequently	Position requires this activity from 33%-66% of the time (2.5-5.5 hrs)			
Constantly	Position requires this activity more than 66% of the time (5.5 hrs +)			

**OSHA CATEGORY CLASSIFICATION:** I understand that the duties that are required of me place me in a Category II.

*While performing the duties of this position, the employee is exposed to weather conditions prevalent at the time. The employee may experience exposure to dust, pollens, pollutants, fumes, and communicable diseases as related to the health care environment. The noise level in the work environment is usually moderate.*

Travel  is  is not required. It is anticipated that travel will be:  5% – 10%  50%-75%  
 10% – 25%  75% - 90%  
 25% – 50%

Canyonlands requires all staff to be vaccinated for Flu, Hep B, MMR, Tdap, Covid-19 and Varicella. New employees must be screened for Tuberculosis.

The specific statements shown in each section of this Job Description are not intended to be all-inclusive. They represent typical elements and criteria considered necessary to perform the job successfully. The job's responsibilities/tasks may be modified and/or expanded over time. **Canyonlands will inform the employee when changes in the respective job description are made.**

I have read and understand the duties / physical requirements indicated in this job description and acknowledge that I am able to perform these duties with or without reasonable accommodation. **I understand that failure to adhere to these responsibilities could be grounds for disciplinary action.**

Print Name

Signature

Date