

**PASTORAL INSTITUTE, INC.  
JOB DESCRIPTION**

**Job Title**      Client Services Representative  
                         Counseling Center

**FLSA:**            Non-Exempt

**Report To:**     Business Office Team Leader

**Date Revised:** 03/20/2018

**General Description:**

Under general supervision, performs work of moderate difficulty by accomplishing general office duties. Exercises independent judgment and initiative in the completion of complex and comprehensive work assignments. Assures uniformity of office procedures with other departments.

**Duties and Responsibilities:**

1.        Manages front desk to receive clients and visitors.
2.        Collects necessary data from new clients. Checks paperwork on new and returning clients to insure that all necessary insurance, EAP, & managed care information and signatures are obtained or updated as needed. Forwards paperwork to appropriate clinician.
3.        Keeps master schedule of all appointments for the current day. Check clients out, and notify clinicians of 'no shows.'
4.        Collects fees from clients, gives receipts, and posts payments to accounts. Directs clients to Business Office as needed.
5.        Performs additional front office functions to include:
  - a. Copying new client paperwork and insurance cards/forms.
  - b. Answering basic client insurance/account inquiries.
  - c. Processing all general faxes through Efax system; routing faxes, tasking clinician, and printing/distributing faxes that can't be routed.
  - d. Providing medical excuse letters for clients.
  - e. Signing for/ notifying recipients of incoming packages; receive incoming and disburse outgoing mail.
  - f. Insuring blank forms (new client paperwork, Intake Reports, ROI, PHQ-9 and GAD-7) are kept stocked.
  - g. Scanning documents into client accounts for clinicians and business office staff.
  - h. Preparing daily counter deposit for the money taken during the day and closing journal.
  - i. Keeping intake and insurance information in a neat and orderly manner.
7.        Assists with scheduling appointments for clients with clinicians as needed; recording pertinent information on intake sheet.
8.        Receives calls from prospective clients and other callers in a courteous and professional manner and routes them to the appropriate person.
9.        Informs the Team Leader, CFO, and/or Clinical Director of any problems regarding scheduling.
10.      Manages/maintains Waiting Room, including brochures.
11.      Other duties as assigned.

**Educational Requirements:**

High School graduate or GED, technical school training preferred.

**Licensure/Registration Requirements:**

N/A

**Experience:**

Minimum 1 - 3 years of office experience in a mental health practice preferred. Computer experience required. Previous public contact work is required. Tact and diplomacy a must for contact with people under stressful conditions. Ability to calmly make decisions based on urgency of the situation and in accordance with work procedures and Pastoral Institute policies. Must maintain professional appearance and demeanor. Must be dependable and punctual, and maintain an excellent attendance record.

**Approved by:** \_\_\_\_\_  
Executive Director

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