

Job Description

Job Title: Financial Counselor

Job Code: 016300

Reports To: Hospital Business Office Manager

FLSA Status: Non-Exempt

Department: Fiscal Services

Status: Fulltime

Days/Hours: M-F, 8:00am-4:30pm

Financial Counselor

Under direct supervision is responsible to notify or locate customers with delinquent accounts and attempt to secure payment.

Basic Skills

- Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Talking to others to convey information effectively.
- Communicating effectively in writing.
- Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Understanding written sentences and paragraphs in work related documents.

Social Skills

- Being aware of others' reactions and understanding why they react as they do.
- Adjusting actions in relation to others' actions.

Resource Management Skills

- Managing one's own time.
- Obtaining and seeing to the appropriate use of equipment, facilities, and materials needed to do certain work.

Desktop Computer Skills

- **Databases** - Using a computer application to manage information, including creating and editing simple databases, inputting data, retrieving specific records, and creating reports to communicate the information.
- **Graphics** - Working with pictures creating simple graphics into programs.
- **Internet** - Using a computer application to create, manipulate, edit, and show virtual slide presentations.
- **Navigation** - Using scroll bars, a mouse, and dialog boxes to work within the computer's operating system. Being able to access and switch between applications and files of interest.

- **Presentations** - Navigating the Internet to find information, including the ability to open and configure standard browsers; use searches, hypertext references, and transfer protocols; and send and retrieve electronic mail (e-mail).
- **Spreadsheets** - Using a computer application to enter, manipulate, and format text and numerical data; insert, delete, and manipulate cells, rows, and columns; and create and save worksheets, charts, and graphs.
- **Word Processing** - Using a computer application to type text, insert pictures, format, edit, print, save, and retrieve word processing documents

Tasks

- Mails form letters to customers to encourage payment of delinquent accounts.
- Confers with customer by telephone in attempt to collect on delinquent accounts.
- Sends accounts to third party collections agency if patient fails to respond.
- Records information about financial status of patient and status of collection efforts.
- Sorts and records correspondence with patients.
- Establishes payment plans within hospital guidelines to help patients manage payment of bills.
- Makes recommendations to management for write-offs.
- Counsels patients in payment and financial assistance options.
- Processes and recommends write offs for financial aid applications.
- Assists admissions with the collection of time of service fees prior to services being rendered.
- Determines patient responsibility and establishes payment arrangements with patient prior to certain services being rendered.

Work Activities

- Getting Information
- Documenting/Recording Information
- Interacting With Computers
- Establishing and Maintaining Interpersonal Relationships
- Updating and Using Relevant Knowledge
- Communicating with Supervisors, Peers, or Subordinates
- Communicating with Persons Outside Organization
- Making Decisions and Solving Problems
- Performing for or Working Directly with the Public
- Performing Administrative Activities

Detailed Work Activities

- Assess financial status of clients.
- Compute debt repayment schedules.
- Correspond with clients to answer questions or resolve complaints.
- Develop financial plans for clients.
- Examine financial records.
- Explain regulations, policies, or procedures.
- Interview clients to gather financial information.
- Prepare documents.

Education/Experience

- High School diploma or general education degree (GED) required
- Related Collections experience and/or training is preferred
- No certification and/or licensures is required.

Language Ability

- Ability to read, write, interpret, present, analyze, correspond general business journals, procedures, regulations is required.
- Bilingual is preferred, although not required.

Work Environment/Physical Demands

- Noise level is minimal to moderate in office setting
- Employee regularly is required to sit at desk for long periods of time, use hands/fingers, handle, reach with hand and arms and talk and hear. Employee occasionally required standing and walking. Regularly lift or move up to 10 pounds. Specific vision ability required includes close vision, and the ability to adjust focus.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Signatures

This job description has been approved by all levels of management.

Manager

Date

HR

Date

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee

Date