

## **JOB DESCRIPTION**

### **Intake Coordinator**

Reports to: Executive Director

Supervises: None

Purpose: The Intake Coordinator is to perform the essential duties of the referral and intake process and maintenance of the clinical records.

Specific Duties/Expectations:

1. Oversee documentation of incoming referrals, verifying fax referral information and completing fax referral if necessary.
2. Assess the urgency of the referrals (notify clinician immediately if urgent).
3. Verify insurance/payer source information.
4. Communicate fees to referral sources and clients.
5. Notify assigned clinical staff of referrals.
6. Notify referral source of referral status.
7. Establish clinical records and file referral information.
8. Maintain records of pending referrals, follow-up with clinicians within 14 days of status of referrals.
9. Remove clients from pending status as appropriate.
10. Assure proper storage and indexing of active and closed client information.
11. Manage closing of records of discharged clients.
12. Complete entries into client databases as assigned.
13. Generate reports from database as assigned.
14. Assure adequate supplies of clinically related forms.
15. Inputs all non-automated billing into system.
16. Process records requests both from TCS to other entities and from other entities to TCS>
17. Send out agency form letters per clinician request.
18. Communication and cooperation with clinical and administrative staff.
19. Assist with Quality Improvement Process as needed or assigned.
20. Assure confidentiality of client information.
21. Send out Satisfaction Surveys to discharged clients on monthly basis.
22. Assist with telephone answering and relaying messages.
23. Other duties as assigned by supervisor.