

## POSITION DESCRIPTION

**INCUMBENT:**

**CSN: 10241**

**FLSA Status: Non Exempt**

**DATE: 2/7/2022**

**PRESENT  
CLASSIFICATION:**

**Medical Insurance Specialist**

**DEPARTMENT:**

**Family & Community Medicine / Decatur**

**DIVISION:**

**SIU Center for Family Medicine-Decatur and  
SIU Decatur Family Medicine Residency Training Program**

### FUNCTION

The person in this position performs functions related to referrals and prior authorizations, billing and insurance related duties, reception and phone coverage. Responsibilities include serving as liaison with specialist offices, insurance companies, and ancillary services (eg, lab, radiology, CT, MRI, major procedures) by assisting in the care patients receive among the different providers. This position fosters a team approach by working collaboratively with the patient, family, physician, and other members of the health care team to ensure services are provided in an efficient and effective manner. This person assists in training staff, and developing and maintaining policies and procedures.

### ORGANIZATIONAL RELATIONSHIPS

This position reports to the Health Center Administrator, who reports to the Site Administrator of SIU Center for Family Medicine-Decatur.

### DUTIES AND RESPONSIBILITIES

The following information is intended to be representative of the work performed by incumbent in this position and is not all-inclusive. The omission of a specific duty or responsibility will not preclude it from the position if the work is similar, related, or a logical extension of position responsibilities.

Demonstrates, by actions, commitment to the mission and the behavioral standards of SIU School of Medicine. Provides excellent service to both internal and external customers through collaboration and partnership; compassion and respect; integrity and accountability; diversity and inclusion; as well as continuous learning and improvement.

#### **55% Referrals & Prior-Authorizations**

1. Maintains patient medical records in accordance to policy.
2. Assists in completing patient referrals and preauthorizations:
  - a) Assists patients with securing referrals to specialist physicians, health care agencies, and hospitals.
  - b) Works with managed care organizations and the physician's office, providing appropriate documentation for referrals, authorizations for hospital, testing or other services.
  - c) Responsible for determining and disseminating the required information from the patient's medical records, i.e., chart notes, school physicals, laboratory results, x-rays, etc., to assure the medical necessity of the request to the consultant, and/or insurance/managed care company
  - d) Helps to maintain up-to-date directory of services provided to SIU Center for Family Medicine - Decatur patients by specialists and health care agencies.
  - e) Contacts managed care companies concerning status of referrals and preauthorizations.

- f) Keeps faculty physicians, resident physicians, nurse practitioners, physician assistants, nurses and other staff at the clinic informed about the requirements and medical necessity guidelines of managed care referrals and authorization requests.
  - g) Provides feedback regarding the development of appropriate forms for internal and external use as it relates to referrals and preauthorizations.
  - h) Helps to maintain log of health care agency addresses and telephone numbers by specialty area.
  - i) Maintains the ability to appropriately handle referrals, schedule appointments, answer general patient questions; knowledgeable about procedures and services.
  - j) Maintains up-to-date on Medicare, Medicaid and Managed Care Guidelines.
  - k) Helps to monitor referral reports, and assists with timely follow-up in accordance with policy and procedure.
  - l) Enters referral and preauthorization information into the electronic medical records and computer system according to policy and procedure.
3. Maintains operating knowledge of the following systems IDX, TouchWorks, MEDI, EPIC and dbMotion.

### **15% Billing preparations**

1. Processes daily Census Report from DMH, making sure patients are registered, demographics and insurance updated.
2. Processes mail-in payments.
3. Prepares inpatient and nursing home charge tickets.
4. Investigates and corrects, as necessary, any credit balances without charges, as identified by SIU Cash Management.
5. Establishes and enters insurance for patient visits for billing process.
6. Processes medical records and form requests for patients, managed care plans, other insurances and attorneys, etc., and forwards to CIOX, as appropriate.

### **30% Assists Reception/CCT Phone Center**

1. Registers new patients in IDX via phone or on-site.
2. Schedules patients in IDX, according to current scheduling guidelines.
3. Greeting patients in friendly and courteous manner.
4. Checking patients in/out: verifying patient demographics, adding/updating patient insurance, working alerts and following front office policies and procedures.
5. Works scheduling task lists within TouchWorks.
6. Participates in training new reception staff, or as needed, with regards to insurance and billing policies and procedures.

### **SKILLS AND ABILITIES NEEDED FOR THE POSITION**

1. Sensitive to the needs of underrepresented minority populations.
2. Medical office experience with a basic knowledge of insurance and/or referral processing.
3. Possess high job accuracy, efficiency, and dependability.
4. Must be computer literate and possess the ability to work within Microsoft Word, Excel, multiple electronic health records, and appointment scheduling system.
5. Possess knowledge of third party payer reimbursement plans, including Medicare, Medicaid and managed care organizations.
6. Demonstrates outstanding customer service skills, communicates well (both verbal and written) and utilizes excellent listening skills and telephone etiquette.
7. Pleasant disposition and high comfort level in dealing with patients, faculty and residents.
8. Ability to handle stressful situations.
9. Maintain a high level of customer satisfaction and retention.
10. Strong attention to detail and accuracy required.
11. Maintain customer/patient confidentiality.
12. Must be self-motivated and able to work independently and with a group setting.
13. Ability to document and report findings and observations.
14. Possess great organizational skills with the ability to multi task, set priorities, and meet deadlines, with the guidance of a supervisor.

**RESPONSIBILITY**

**A. Supervisory Controls** - As needed, the supervisor assigns duties. The employee follows established procedures and will be expected to work independently and within a team setting, with supervisor oversight.

**B. Guidelines** - Guidelines and policies are set by the supervisor and faculty. The incumbent will follow established protocols developed by SIU Center for Family Medicine-Decatur, SIU Healthcare, and FQHC.

**DIFFICULTY**

**A. Complexity** - The incumbent must be able to adapt to changes in physician requirements and needs and must use sound judgment and be attentive to detail.

**B. Scope and Effect** - This position is responsible for assisting patients and helping to bridge patient care with a number of outside offices and agencies. Negligent performance could be harmful to a patient's health and impact their quality of life.

**PERSONAL CONTACTS**

This person will work directly with faculty, residents, and staff within and outside the SIU Center for Family Medicine-Decatur. External contacts include University, School of Medicine faculty, resident physicians, hospitals, employer/managed care companies, and numerous specialists' offices.

**ENVIRONMENTAL, HEALTH AND SAFETY RESPONSIBILITIES**

Participation in meetings, trainings and other environmental, health and safety activities as required by SIU School of Medicine and SIU Center for Family Medicine-Decatur.

**WORKING CONDITIONS**

Job duties are performed in a pleasant work environment. See attached Physical and Environmental Requirements form.

**COMMENTS**

Must be able to handle multiple requests at the same time. Must observe principles of medical ethics and maintain strict confidentiality.

**UNIT SIGNATURES:**

\_\_\_\_\_  
Medical Insurance Specialist  
SIU Center for Family Medicine-Decatur

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

\_\_\_\_\_  
Danika L Holman  
Health Center Administrator  
SIU Center for Family Medicine-Decatur

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

\_\_\_\_\_  
L David Samples  
Site Administrator  
SIU Center for Family Medicine-Decatur

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

# PHYSICAL AND ENVIRONMENTAL REQUIREMENTS

## SIU SCHOOL OF MEDICINE

Incumbent: \_\_\_\_\_ Classification: Medical Insurance Specialist  
 Position No. (if applicable): N10241 Department: Family and Community Medicine/Decatur-SMS

**WORK ENVIRONMENT: (Check all applicable environments)**

<input checked="" type="checkbox"/> Office	<input type="checkbox"/> Hospital
<input checked="" type="checkbox"/> Clinic	<input type="checkbox"/> Warehouse
<input type="checkbox"/> Research Laboratory	<input type="checkbox"/> Outdoors
<input type="checkbox"/> Other (Be Specific): _____	

PHYSICAL DEMANDS:	Seldom	Occasionally	Frequently	Constantly	N/A
(Indicate frequency of activity during performance of position duties)	(Performed rarely less than 2% of the time)	(Performed less than 25% of the time)	(Performed 26% to 50% of the time)	(Performed 51% or most of the time)	

*(Click on the Physical Demands Definitions button at the bottom of the form for a list of physical demands definitions)*

Reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Speaking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Close visual acuity	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Travel	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hearing - Conversation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Hearing - Other Sounds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Stooping	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Squatting	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gross hand manipulation	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fine hand manipulation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working in dust, fumes, gases, or irritants	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Working at heights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Working in extreme cold, heat and/or humidity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Working in close quarters	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Climbing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Operating motor vehicles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Sitting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Standing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Walking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Working above shoulder level	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twisting	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kneeling	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pushing or pulling		10 - 20 lbs.			<input type="radio"/>
Carrying		10 - 20 lbs.			<input type="radio"/>
Lifting		10 - 20 lbs.			<input type="radio"/>
Other (Please list): _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I affirm the environmental and physical demands listed on this form are an accurate reflection of the requirements of this position to the best of my knowledge and belief.

I have read, understand and am capable of meeting the physical and environmental demands of this position.

Supervisor Signature	Date	Supervisor Name	Employee Signature	Date
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