

JOB DESCRIPTION

TITLE: Customer Service Representative / Sales Coordinator

FUNCTION: Under general supervision, is responsible for the timely processing of all new patient accounts. To coordinate scheduling of services for assigned sales representative, maintenance of patient files, and the production of all delivery paperwork.

HAS SUCH DUTIES AS:

1. Is responsible for accurately loading all patient information into working system, generating all delivery paperwork for sales, rental & service orders, provide a high level of customer service to patients, referral & pay sources.
2. Is responsible for maintaining a strong working knowledge of products & services, funding sources and company policies & procedures. Develop and maintain a strong understanding of specific requirements of contracted providers.
3. Is responsible for maintaining patient files as specified in company policy, and other tasks as required.

POSITION REQUIREMENTS:

1. High School diploma or equivalent.
2. Prior Health Care experience strongly preferred.
3. Good communication skills.
4. Prior Customer Service experience preferred.

Employee Performance Evaluation

Position: Customer Service/Sales Coordinator

Employee: _____

Date: _____

Rating Scale:

0 = Performance is Unacceptable, Immediate improvement required.

1 = Performs as expected, occasionally needs reinforcement.

2 = Performs as expected most of the time.

3 = Performance is Exemplary, Exceeds Expectations

Quality of Work:

0 1 2 3

1. Courteously answers phone and identifies self.
2. Takes accurate messages and repeats information to ensure accuracy.
3. Completes admission forms for services thoroughly and accurately.
4. Accurately collects appropriate billing information.
5. Verifies insurance coverage limits prior to proceeding with an order.
6. Accurately assigns procedure codes for services.
7. Accurately prepares delivery paperwork in a timely fashion.
8. Provides sales personnel with accurate information pertaining to their appointments.
9. Accurately tracks pending sales for assigned salesman.

Supportive Documentation and Comments: _____ Total Points: _____

_____ Average: _____

CSR/Sales Coordinator Evaluation
Page Two

0 1 2 3

Quantity of Work:

1. Completes all assigned work during scheduled shift.
2. Responds to telephone by third ring and promptly acknowledges caller.
3. Files appropriate forms in client file within two business days.
4. Documents all pertinent patient activity in patient account.
5. Enters all new accounts into tracking within 1 business day of our acceptance as a client.
6. At end of day reviews unfinished projects to prioritize next days workload.

Supportive Documentation and Comments: _____ Total Points: _____

_____ Average: _____

Knowledge of Job:

0 1 2 3

1. Correctly explains company billing procedures to clients and referral sources.
2. Documents understanding of coverage requirements for Medicare and other carriers.
3. Spells and uses medical terminology correctly.
4. Demonstrates awareness and understanding of job description and job responsibilities.
5. Participates in company in services.
6. Attends and contributes to staff meeting.

Supportive Documentation and Comments: _____ Total Points: _____

_____ Average: _____

CSR/Sales Coordinator Evaluation
Page Three

0 1 2 3

Judgment & Decision Making:

1. Consults with supervisor when unusual situations occur. Does not make impulsive decisions.
2. Ensures that correct authorizations are obtained prior to initiating service(s).

Supportive Documentation and Comments: _____ Total Points: _____

_____ Average: _____

Reliability and Initiative:

0 1 2 3

1. Arrives on time at start of scheduled shift.
2. Returns promptly from breaks/lunch.
3. Provides proper notification to supervisor for scheduled absences.
4. Follows procedures for reporting tardiness.
5. Attends to personal affairs to avoid disrupting the work schedule.
6. When requested, is willing to work extra hours.
7. Recognizes need for and performs additional unassigned tasks.
8. Helps co-workers.
9. Maintains work area in an orderly fashion.

Supportive Documentation and Comments: _____ Total Points: _____

_____ Average: _____

PERFORMANCE EVALUATION SUMMARY SHEET

POSITION: _____

	QUALITY OF WORK	QUANTITY OF WORK	KNOWLEDGE OF JOB	JUDGMENT AND DECISION MAKING	RELIABILITY AND INITIATIVE	OVER ALL RATING
#OF POINTS						
#OF STANDARDS						
AVG.						

Developmental Goals & Training needs:

Employee Comments:

Supervisor Comments:

Supervisor Signature: _____ Date: _____

Employee Signature: _____ Date: _____