Job Title: Intake Specialist
Department: Business Services
Reports To: Office Manager
FLSA Status: Non-exempt
Prepared Date: July 2019

Primary Purpose of the Job
The Intake Specialist is the first point of contact with responsibility for greeting and providing a positive experience for clients and visitors to Hively. The Intake Specialist will also work closely with Clinicians and the Office Manager to fulfill administrative duties in both the front and back of office. This position requires someone who enjoys working collaboratively and possesses excellent customer service skills when interacting with the community.

Essential Duties
- Provide basic Agency overview to individuals who are interested in receiving services.
- Help clients who arrive for their program appointments to sign in and announce their arrival to the staff member that they are here to see.
- Schedule client appointments and make appointment reminder calls for appointments.
- Processes client intake forms and follows up with clients for incomplete information, checking paperwork to ensure accuracy and compliance to HIPAA procedures.
- Creates new clients in database system, NueMD and performs benefit investigation for eligibility.
- Tracks any changes of insurance and payments for services.
- Update and close files as needed.
- Coordinate with the county on referral processes.

Required Knowledge, Skills and Abilities
- Able to operate copy machines, basic computer programs, fax machines, word processing and e-mail.
- Excellent communication skills, written and verbal required
- Must be able to communicate effectively, to perform multiple tasks effectively and efficiently, to work with minimal supervision, to react to change productively and to handle other essential tasks as assigned.
- Must be able to handle sensitive issues, conflict with or among others, respectively direct and reinforce staff efforts; effectively plan and organize and prioritize work, and to effectively solve unique problems as they arise or identify when to consult supervisor.
- Must be able to deal with a challenging work environment from time demands and conflicting priorities.
Preferred Knowledge, Skills and Abilities
- Bachelor’s Degree from an accredited college or university in related field
- Working knowledge of Minimum Standards for Child Placing Agencies is preferred.
- Bilingual with English and Spanish is a plus.

Physical Requirements
- Ability to sit at a desk for extended amounts of time
- Ability to stand for extended amounts of time
- Manual dexterity to use a telephone and computer
- Facility to hear and understand speech at normal room levels, and to hear and understand speech on the telephone
- Facility to speak in audible tones so that others may understand clearly in normal conversations and over the telephone
- Physical agility to lift and carry up to 20 pounds and to bend, stoop, walk and reach overhead
- Physical agility to push/pull, squat, twist and turn
- Mental acuity to perform the essential functions of this position in an accurate and timely fashion; to make good judgments and decisions; and to evaluate the results of decisions and judgments

Note: This list of essential functions and physical requirements is not exhaustive and may be supplemented as necessary in accordance with the requirements of the job. Hively adheres to the provisions of ADA regarding reasonable accommodation procedures.