



POSITION DESCRIPTION

Financial Case Manager

Reports to: Patient Finance Supervisor Position Status: Non-exempt

Supervises: No one Effective Date: 6/15/23

GENERAL SUMMARY

The Financial Case Manager reports to the Patient Finance Supervisor and is responsible for the ongoing coordination of funding for Northwest Kidney Centers (NKC) patients. The Financial Case Manager must know and consider existing federal, state, and non-governmental assistance program rules that impact kidney disease patients, when assisting individual patients. It is the responsibility of the Financial Case Manager to assist patients in meeting their obligation to obtain and maintain all eligible funding to minimize charity, bad debt, and any personal balances. All patient interaction must be done while respecting and accommodating the patient's health status.

DUTIES AND RESPONSIBILITIES

1. Manages caseload to ensure that funding is in place for all assigned dialysis and transplant patients.
2. Conducts initial and ongoing patient financial interviews to assess funding needs and to counsel patients and families on funding options, as necessary.
3. Monitors ongoing patient funding status and intervenes as appropriate to counsel and assist each patient when changes to funding sources are required.
4. Files appeals with federal, state, or private insurance agencies as appropriate, and participates in fair hearings as required and in accordance with NKC policy.
5. Follows established NKC Patient Finance policies and actively works to assist patients and members of the NKC staff.
6. Assists with qualifying patients for non-NKC premium support programs in accordance with NKC policy.
7. Determines patient eligibility for transportation services and coordinates with social services as appropriate.

8. Contacts patients directly when notified by billing team members of patient non-compliance with requests for updated information.
9. Serves as a resource on funding issues for other NKC department employees.
10. Serves as a liaison with federal and state officials who oversee programs that fund kidney disease patients.
11. Is responsible for staying current/up to date on changes in federal & state rules that affect the funding available to patients with kidney disease.
12. Participates in outside, non-NKC meetings, as appropriate.
13. Participates in educational presentations provided by payers/funding agencies, as appropriate.
14. Collaborates with other NKC departments on procedural and systems development, documentation, and maintenance.
15. Consults with the registration and insurance specialist or Patient Finance Supervisor to resolve conflicting insurance coverage information.
16. Performs other duties and responsibilities as assigned.

EXTERNAL CONTACTS

This position has direct contact with patients, physician offices, representatives from governmental and non-government payers, hospitals, consultants, and other organizations. These contacts are required to clarify, and/or check accuracy of insurance information for the purpose of billing claims and/or to secure additional patient funding.

CUSTOMER SERVICE STANDARDS

Staff are responsible for demonstrating good customer service and professionalism.

1. **CONSIDERATION:** Greet customers promptly; show courtesy; recognize customer's needs; respect privacy.
2. **CONCERN:** Listen to customers; express appreciation, be non-judgmental; take responsibility.
3. **CONFIDENCE:** Show a positive attitude; take personal initiative; inform; educate and reassure; provide prompt follow-up.
4. **CONDUCT:** Hold appropriate conversations; maintain a professional appearance; establish teamwork; show professional competency.

JOB CONDITIONS

Must be able to communicate effectively in English over the telephone, in writing, and in person. Duties and responsibilities are performed in an office environment.

Physical activities require the ability to stand, walk, stoop, kneel, crouch, reach, lift; fingering, grasping, talking, hearing, and repetitive motions of hands, wrists, and fingers. Requires a high-level of hand-eye coordination. Must have strong visual acuity to read, inspect information on monitors, and inspect technical documents.

Physical requirements include the ability to lift/move objects weighing up to 20 pounds occasionally, and up to 10 pounds frequently. The individual in this position operates the phone, computer, copier, and other office equipment as required. Demonstrated skills in Microsoft Office Products are required.

EDUCATION AND EXPERIENCE

Requires an associate degree in healthcare administration or a business-related field, or two years' equivalent experience in a medical office environment including experience in billing, insurance funding, understanding of referrals, prior authorizations, coordination of benefits, and must have a strong working knowledge of Medicare and Medicaid entitlement programs. Dialysis related experience is preferred. Requires proficiency in Microsoft Office Suite products.

The above statements are intended to describe the general nature and level of work performed by people assigned to this classification. They are not to be considered as an exhaustive list of all job tasks performed by people so classified.

REVIEW AND APPROVAL

DocuSigned by:
Karen Schartman
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Vice President of Finance/CFO

6/15/2023

Date

DocuSigned by:
Liberty Stansbery
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Vice President of Human Resources/CHRO

6/19/2023

Date