



Job Description Intake Coordinator

Definition

The main role of the Intake Coordinator will be to ensure that all client intakes are completed fully before being seen by a practice provider.

Characteristics

This position is a full-time position. The person in this position must be well organized. Additionally, they must be able to handle themselves professionally on the phone and understand HIPAA confidentiality regulations in order to protect the privacy of the clients they assist. The person in this position must have computer skills and experience scheduling appointments.

Supervision

This position is supervised by the Office Manager.

Responsibilities

1. Complete the intake process for all new clients. The process includes the following:
 - a. Management of incoming intake emails.
 - b. Provide all new clients with intake packets (electronically) and ensure that they have been received.
 - c. Assist clients with the completion of intake packets, making sure all information is filled in and entered appropriately into ICANotes. Ensure all documents requiring signatures and dates are completed.
 - d. Upload intake packet and accompanying documents into ICANotes.
 - e. Coordinate insurance verification with staff assigned to complete insurance verifications.
 - f. Schedule intake appointment with appropriate provider once insurance verification is completed. Reschedule appointments as needed.
 - g. Update Intake progress notes.
 - h. Act as a liaison between new clients and providers for the intake and transition clients to appropriate assigned FD staff /provider.
 - i. Notify appropriate staff/providers on the status of intakes.
 - j. Communicate as required with management team regarding intakes issues.
2. Complete other administrative tasks as assigned by supervisor or other office managers/directors and Dr. Wagner.
3. Place reminder calls as assigned.
4. Other duties as assigned.