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# Example of Financial Counselor Job Description

Our company is hiring for a financial counselor. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for financial counselor

* Identify and assist patients/guarantors in obtaining other sponsorship including third party liability, workers compensation, COBRA, government health or other programs, and free or discounted drug programs
* Assist patients/guarantors who may be eligible with qualifying for assistance under PH&S Charity Policies and Procedures and helping them through the application process
* Work regularly with providers about patient care plans including medication assistance programs, clinic treatment plans and discharge to ensure charity approvals are appropriate based on clinical financial need
* Make charity determinations within approval limits
* Follow up with patients/guarantors to discuss resolution of account balances remaining after insurance or other sponsorship/charity approval, including payment plans and discounts under PH&S and ORC discount policies
* Work proactively with patients/guarantors to resolve account balances, ensuring only those accounts that are truly uncollectible drop to self pay
* Review and respond to applications within the prescribed timeframes verbally and/or in writing
* Investigate financial information relating to the application for Financial Assistance
* Respond to inquiries via telephone and/or letter in a timely fashion
* Coordinate status reports to the management team

## Qualifications for financial counselor

* Ability to juggle multiple insurance issues
* ACD Software Training
* Website Insurance Training (Navinet, WebMD, Passport)
* EPIC training & testing (Prelude/Cadence)
* Registration Essentials
* Cardiac Center databases