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# Example of Intake Specialist Job Description

Our company is growing rapidly and is looking for an intake specialist. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for intake specialist

* Communicate with patients and caregivers regarding nutrition formula refill requests and patient financial obligations
* Communicate with insurance providers and physicians to obtain clarification on medical documentation or request missing documentation required to process patient orders and reimbursements
* Arrange for nutrition product delivery with patients, caregivers and couriers and update case managers on patient status
* Process payments for self pay patients and submit product orders prior to a daily cutoff
* Receive and respond to incoming calls from referral sources or potential patients, exchange information to identify patients’ needs, and determine the Company’s ability to meet them
* Enter referral information in System including clinical information and orders for services if available
* Notify branch of referral via email as either pending or ready to be staffed
* Access national account information, including the names of the accounts and the terms of the contracts as appropriate
* May obtain ongoing authorizations for visits based upon written information supplied by clinical field staff
* Identify potential payer sources, establish primary payers, document demographic/clinical/payer information, obtain initial authorization if applicable and determine coverage availability for third party non-governmental payers

## Qualifications for intake specialist

* Required 1+ year of experience in a Claims, Customer Service, Appeals, Pharmacy, Front End, Configuration or Enrollment, Data Capture role, preferably in a health services environment
* Intermediate Other Ability to review correspondence and system data to determine appropriate handling consistent with applicable policies and procedures
* Required Beginner Other Ability to work across multiple computer programs to process a single request
* Required Beginner Other Proficient in data entry
* Master's degree in Social Services or related field is required
* Three (3) years of experience in healthcare or related field is required