



# Example of Financial Representative Job Description

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Our company is looking to fill the role of financial representative. 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 representative

- Quality - Accuracy and thoroughness of work results
  - Dependability - Degree of required follow-up in the completion of assigned tasks is less than 10%
  - Work Habits - Comply with all departmental and hospital policies and procedures including but not limited to
  - Manages the process to ensure that all Benefit Advisors are educated and trained in identifying patients who are uninsured and underinsured
  - Advises patients and/or family members of their financial obligation via all modes of communication, including face-to-face communication while in the facility
  - Obtains payment in full or secures adequate payment arrangements/eligibility and benefit information for both inpatient and outpatient services
  - Advises patients as to their financial liability and assists with insurance issues and activation of coverage
  - Administers collection program on international and cosmetic patients as directed per hospital policy to collect pre-payments
  - Utilizes Charge Master, EPIC price estimator, and business tools to provide cost estimates for complex procedures, surgeries, and ancillary testing and ensures information is received from patients and physicians
  - Serves as a resource to Patient Accounting staff, Social Workers, and other staff for identification of funding sources for health services for patients
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- Desire to learn and dedication to study and apply a new concepts in order to obtain your financial licenses
- Complete FSR School and pass final exam to be assigned to the branch, On the job training with another teller for 3-5 days post FSR school
- You're flexible and adaptable
- Bachelor's degree in Finance, Marketing, Operations or equivalent
- Series 7 preferred, or able to obtain within 120 days of hire
- Requires a 4 year college degree and an interest in career development