



**JOB TITLE:** Customer Care Agent  
**EXEMPT:** No  
**DEPARTMENT:** Customer Care Team  
**STATUS:** Full-Time  
**REPORTS TO:** Customer Care Manager

**SUMMARY:** Responsible for processing medical supply referrals/orders by phone, email, text message, and/or chat, performing insurance verification, inputting data and generating claims/orders to be shipped and billed by insurance provider or customer, for a mail order diabetes supply company.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following:

- Patient Communication: includes both written and verbal communication with patients: i.e. via phone, email, text message and/or website chat
- Gathers and reviews information provided by patient or referral source. Inputs accurate and complete patient information in database systems
- Verifies Insurance and calculates deductible and/or co-insurance that needs to be collected
- Bills or prepares items to be billed to insurance
- Generates delivery ticket and schedules shipment of product
- Interacts directly with customers, insurance health plans, and doctor offices by telephone Fax, email and chat
- Communicates and coordinates with internal departments
- Inform customers of additional related services provided by Healthy Living and assist with the on-boarding process for these services
- Maintains accurate customer records by updating patient account information
- Resolves problems by clarifying the patient's complaint; determining the cause of the problem; selecting and explaining the best solution to solve the problem; expediting correction or adjustment; following up to ensure resolution
- Maintain confidentiality of patient records according to HIPPA, insurance regulations, Medicaid/Medicare and company policy
- All other duties as assigned by supervisor

**QUALIFICATION REQUIREMENTS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Alignment with company's core values
- Must be able to use good and sound judgment
- Must be able to learn and retain knowledge on diabetes related therapies and products
- Must be able to document clearly, accurately and appropriately in computer database systems

- Must follow up as needed with doctor's office, insurance providers, HLMS staff and management pertaining to any concerns regarding patient care
- Demonstrates patience, flexibility, team oriented behavior and a collaborative attitude
- Able to provide excellent customer service, which includes effectively resolving conflicts
- Able to effectively manage concurrent demands and multi-task with strong time management skills
- Attentive to details and ability to retain a detailed body of knowledge necessary to provide quality service within the company's approved processes, procedures and plans
- Must be able to work calmly and professionally while handling urgent situations.
- Demonstrate strong communication skills - both written and oral
- A desire to regularly learn new skills and concepts both independently and via company offered inservice learning opportunities
- Proficient in Microsoft Office suite, particularly Excel.
- Be proactive and self-directed within the job responsibilities

#### **EDUCATION and/or EXPERIENCE:**

- High School Graduate, Associate's Degree preferred.
- Minimum of one (1) year of experience in a customer service capacity.
- Knowledge of relevant computer applications.
- Numeric, oral and written language applications.
- Knowledge of diabetic supplies and the disease is helpful but not necessary.

**CERTIFICATES, LICENSES, REGISTRATIONS:** Must have and maintain in good standing professional license, certificate or registration. Should have a valid Michigan Driver's License.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee regularly is required to stand, walk, sit, use hand to finger, handle or feel objects, tools, or controls; and reach with hands and arms.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This job generally operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

**COMMENTS:** This description is intended to describe the essential job functions, the general supplemental functions and the essential requirements for the performance of this job. It is not an exhaustive list of all duties, responsibilities and requirements of a person so classified. Other functions may be assigned and management retains the right to add or change the duties at any time.

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_