



## **Intake Specialist**

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**Job Title:** Intake Specialist  
**FLSA Classification:** Non-Exempt  
**Department:** Center Administration  
**Supervisor:** Intake Supervisor

### **Job Summary**

Under the direction of the Intake Supervisor, The Intake Specialist performs a variety of duties both clinical and clerical in nature. This position requires skill in planning, organizing and coordinating enrollment and retention activities, as well as the coordination of day to day administrative activities.

### **Essential Job Functions**

- Assists with receiving and coordinating all referrals. Updates referral tracker on a weekly basis.
- Verifies Medi-Cal and Medicare coverage. Notification of insurance providers for prior authorization and services covered.
- Assists with scheduling initial pre-enrollment and post enrollment assessments
- Updates Intake log for reporting to Program Director and Business Development Director.
- Answers phone calls from prospective enrollees and provides information regarding eligibility requirements and PACE services.
- Schedules face to face meetings with prospective enrollees to conduct intake and to provide a site tour.
- Assists with the coordination of PPN assignments and orientation process
- Updates PrimeSuite and PaceLogic with new enrollment demographic data, including language requirements and “preferred provider.”
- Maintains intake files and reports.
- Coordinates requests for medical records, working closely with the medical records department, for newly enrolled PACE participants and provides information to IDT members as needed.
- Assists with recruitment efforts by conducting outreach activities and designated provider and community locations. Assists with marketing activities and special projects as needed.
- Participates at IDT and other meetings as needed.



- Assists Intake Coordinator to update Intake forms as requested by the Program Director
- Responsible for meeting target enrollment and quality improvement goals.
- Responsible for adherence to all regulations, both federal and state, which govern the operations of a PACE organization and a licensed adult day care center.
- Responsible for adhering to CMS, DHCS, and PACE Policies and Procedures while conducting intake activities
- Maintain confidentiality regarding participant, staff, contractor, and organizational information.
- Follows the chain of command when reporting issues and outcomes

### **Competencies**

- Communication Proficiency
- Customer/Client Focus
- Technical Capacity
- Thoroughness
- Successful passing of PACE Marketing Exam within 90 days

### **Non-Essential Job Functions**

- Attend and participate in staff meetings, in-services, projects, and committees as assigned.
- Adhere to and support the center's policies, practices, and procedures.
- Accept assigned duties in a cooperative manner; and perform all other related duties as assigned.
- Be flexible in schedule of hours worked.
- May require use of personal vehicle.

### **Working Conditions and Physical Demands**

The working conditions and 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.

- Ability to access all areas of the center throughout the workday.
- Ability to lift up to 35 pounds occasionally, 15 pounds frequently, and 7 pounds constantly; required to obtain assistance of another qualified employee when attempting to lift or transfer objects over 25 pounds.



- Requires constant hand grasp and finger dexterity; frequent sitting, standing, walking and repetitive leg and arm movements, occasional bending, reaching forward and overhead; squatting and kneeling.
- Ability to communicate verbally with an excellent comprehension of the English language.
- Work is generally performed in an indoor, well-lighted, well-ventilated, heated, and air-conditioned environment.

### **Experience**

- Minimum of one (1) year of documented experience working with a frail or elderly population.

### **Knowledge, Skills, and Abilities**

- Analytical
- Thorough knowledge of current concepts and practices of health and social services to the elderly, particularly of home- and community-based services, interdisciplinary team facilitation model, and clinical leadership expertise.
- Knowledge of utilization review, quality assurance, and managed health care concepts.
- Knowledgeable as an advocate for risk-based long-term care programs, specifically the PACE model.
- Basic familiarity with management information systems, including fiscal management issues.
- Excellent planning and supervision abilities.
- Ability to work effectively and harmoniously with staff, elderly, public and private agencies, governmental officials, providers of services, and peers.
- Energetic, well organized, dependable, flexible, and resourceful.
- Effective oral and written communication skills.
- Working knowledge of desktop application software (Microsoft Office).

### **Education and Certification**

- Is medically cleared for communicable diseases and has all immunizations up-to-date before engaging in direct participant contact.

### **Acknowledgment:**

**I have read** the above Intake Specialist job description and fully understand the requirements set forth therein. I meet all the requirements of this position, and I can perform all essential



functions of the job. I agree to abide by the requirements set forth in this document.

**I understand** the contents of this job description are presented as a matter of information only and as guidance as to the expectations of Fresno PACE for this position. This job description is not intended to give rise to contractual rights or obligations, or to be construed as a guarantee of employment for any specific period of time or for any specific type of work. Furthermore, Fresno PACE reserves the right to interpret, amend, modify, or cancel or withdraw any or all sections or provisions of this job description at any time with or without notice.

**I understand** that employment at Fresno PACE is “at will”, meaning that employment is for no definite period of time and may be terminated by me or Fresno PACE at any time and for any reason.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Fresno PACE Representative

\_\_\_\_\_  
Date

We are an Equal Opportunity Employer and do not discriminate against any employee or applicant for employment because of race, color, sex, age, national origin, religion, sexual orientation, gender identity, status as a veteran, and basis of disability or any other federal, state or local protected class.

<b>Written Date</b>	08/01/2014	<b>Revised Date</b>	05/23/2017
<b>Reviewed Date</b>	06/21/2017	<b>Discontinued Date</b>	
<b>Approved By and Title:</b> QAPI Committee 09/22/2017			