

**MASON CITY CLINIC**  
**Job Description**

**Job Title:** Patient Account Representative  
**Department:** Business Office

**FLSA Status:** Nonexempt  
**Employee Group:** Non-Management

**General Summary:**

Under general supervision and according to prescribed methods, examines patient accounts in order to respond to patient questions. In doing so, reviews transactions, insurance claims and payment received, researches medical records chart for discrepancies, and refiles corrected insurance claims as necessary. Initiates guarantor financial responsibility discussion on assigned accounts obtaining payment and/or establishing recurrent payment plan. Reviews and determines appropriate action needed related to claim denials as assigned. In doing so, reviews EOB denial and remark codes to determine accuracy of claim submitted; verifying payer policy via website or by contacting payer by telephone, fax or web inquiry when clarification is needed. In completing the inquiry various forms or letters may be submitted with documentation to obtain appropriate payment and maintain proper status of accounts.

**Principal Duties and Responsibilities:**

1. Responds to patient questions regarding their account by explaining charges, insurance reimbursement and respective patient financial responsibility. Researches discrepancies in patients' accounts, initiates insurance reviews, and forwards documentation of necessary adjustments to appropriate department staff for correction and claim resubmission. Alerts chronic bad debt accounts and works with those patients on establishing pre-service payments.
2. Researches rejected insurance claims by reviewing patient chart and account information, corrects data, and resubmits claim or claim adjustment to insurance company. Monitors claims for payment and contacts insurance company as necessary to determine reason for delayed payment.
3. Contacts responsible workers compensation entity in order to obtain correct claim filing information and to determine reason for delayed payment when appropriate.
4. Monitors accounts with outstanding insurance balances by locating and reviewing explanation of benefits, filing required forms within the filing deadline and submits claims to secondary insurance as necessary. Using prescribed guidelines, adjusts account balances to reflect prorated amounts.
5. Receives payments from patients, prepares receipts, and properly stores daily funds according to established guidelines. Establishes payment plans with guarantors.
6. Protects patient's rights by maintaining confidentiality of personal and financial information.
7. Performs various related duties such as copying materials, sending letters and forms to patients and insurance companies, obtain estimated charges for services, updates patient account information as necessary, and so forth.
8. Maintains knowledge of trends and developments in the field by reading appropriate material, and by attending seminars, conferences and so forth.
9. Files primary and secondary insurance for patients unless instructed otherwise.
10. Communicates with patients, other departments and various clinic staff in a professional and courteous manner at all times. Works cooperatively with other departments and Clinic staff to improve processes, systems and communications.

11. Actively participates in the process improvement initiatives and seeks to identify and resolve issues through teamwork and collaboration.
12. Performs other department duties as assigned.

**Knowledge, Skills and Abilities Required:**

1. Ability to read and write in order to review patient account transactions, prepare various insurance forms, and review medical records information and to perform arithmetic calculation in order to verify account balance and determine adjustments at a level normally acquired through completion of one year post high school vocational, technical, or business school training.
2. Approximately six to twelve months of work experience with insurance claim processing necessary in order to understand patient account transactions and department procedures, to research discrepancies and resolve account errors, and to understand precertification requirements.
3. Interpersonal skills necessary in order to effectively respond to patient inquiries regarding sensitive account information, to exchange patient data with insurance companies when resolving claim discrepancies, and to research patient account problems with other department personnel.
4. Analytical skills necessary in order to examine patient account information to locate discrepancies and provide documentation for insurance claims, and to determine necessary adjustments to accounts.
5. Ability to concentrate and pay close attention to detail for approximately sixty percent of work time when examining patient accounts, researching discrepancies, and preparing adjustments.

**Working Conditions:**

1. Works in a normal office environment where there are few, if any, physical discomforts due to dust, dirt, noise and the like.

**Reporting Relationships:**

Reports to the Business Office Manager.

**Approvals:**

\_\_\_\_\_  
Department Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
Administrator

\_\_\_\_\_  
Date

The above is intended to describe the general content of and the requirements for the performance of this job. It is not to be construed as an exhaustive statement of duties, responsibilities or requirements.

Revised 7/17

**WORKING CONDITIONS AND PHYSICAL DEMANDS WORKSHEET**Date: 7/2017Job Title: Patient Account Representative Department: Business Office**1. Physical Activities**

Activity	Does Not Apply	Occasionally (8-10%)	Periodically (11-20%)	Frequently (21-50%)	Very frequently (51-80%)	Continuously (80% or more)
Balancing	X					
Bending	X					
Climbing	X					
Crawling	X					
Crouching	X					
Kneeling	X					
Reading						X
Sitting						X
Squatting	X					
Standing		X				
Stooping	X					
Walking		X				

**2. Lifting and/or Pushing and Pulling**

Weight	Does Not Apply	Occasionally (8-10%)	Periodically (11-20%)	Frequently (21-50%)	Very frequently (51-80%)	Continuously (80% or more)
0-10 pounds		X				
10-20 pounds	X					
20-30 pounds	X					
30-60 pounds	X					
Over 60 pounds	X					

### 3. Carrying and/or Pushing Pulling

Weight	Does Not Apply	Occasionally (8-10%)	Periodically (11-20%)	Frequently (21-50%)	Very frequently (51-80%)	Continuously (80% or more)
0-10 pounds		X				
10-20 pounds	X					
20-30 pounds	X					
30-60 pounds	X					
Over 60 pounds	X					

### 4. Visual Activity

Level	Yes	No	Comment
Near Vision	X		
Far Vision		X	
Depth Perception		X	
Fine Discriminate Detail		X	
Color Vision		X	
Field of Vision		X	

### 5. Auditory Activity

Level	Yes	No	Comment
Distinguish Sounds		X	
Distinguish Pitch		X	
Distinguish Tone		X	
Hear Speech	X		

## 6. Sensory Activity (Touch & Smell)

Level	Yes	No	Comment
Distinguish Hot & Cold		X	
Distinguish Range of Temperature		X	
Distinguish Surfaces		X	
Fine Motor Skills to Grasp		X	
Manual Dexterity	X		Keyboarding & 10-key skills required
Detect Odors		X	
Distinguish Odors		X	

## 7. Verbal Activity

Level	Yes	No	Comment
Make Sounds		X	
Form Words	X		
Speak Loudly		X	
Speak Softly		X	

## 8. Mental Activity

Activity	Does Not Apply	Occasionally (8-10%)	Periodically (11-20%)	Frequently (21-50%)	Very frequently (51-80%)	Continuously (80% or more)
Performing detailed tasks (bookkeeping, transcribing, etc.)						X
Subjected to interruptions			X			
Subjected to changing work priorities		X				

**9. Hazardous Conditions**

Activity	Does Not Apply	Occasionally (8-10%)	Periodically (11-20%)	Frequently (21-50%)	Very frequently (51-80%)	Continuously (80% or more)
Exposure to marked changes in temperature & humidity	X					
Exposure to electrical shock	X					
Exposure to vapor, fumes & gases	X					
Exposure to radiation	X					
Exposure to infectious disease	X					
Driving automotive equip.	X					
Exposure to weather elements	X					