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| **JOB DESCRIPTION** | | | | | |
| **JOB TITLE** | CLIENT RELATIONSHIP MANAGER | | | **pAYROLL JOB CODE** | CRM |
| **LOCATION** | AGENCY OFFICE | | | **credentials** | NONE REQUIRED |
| **Department** | ADMINISTRATION | | | **REPORTS TO** | AGENCY DIRECTOR |
| **fsla sTATUS** | EXEMPT | **STARTING PTO LEVEL** | 1 | **EMPLOYMENT CLASS** | FULL TIME |

**Summary**

A Client Relationship Manager acts as an intermediary between the client, the caregiver, the agency, and state case managers to meet the client’s need for information, assistance, support, and to communicate client desires and expectations to the correct parties. The Client Relationship Manager acts as the client’s primary point of contact at the agency and understands how to navigate the agency’s resources to meet the client’s needs. The Client Relationship Manager helps the company understand the customer’s needs, expectations or difficulties. This position is also responsible for performing caregiver-facing activities including interviewing, managing, and scheduling caregivers for agency clients.

**Essential Job Duties AND Responsibilities**

* Drives agency outreach and education efforts by educating potential clients who may need assistance with the activities of daily living on the agency’s services.
* Communicates with agency sales staff to coordinate the onboarding of new clients.
* Enters new prospective clients into the appropriate agency and state tracking databases.
* Tracks Medicaid applicants’ approval progress and communicates with state case managers via phone and email to ensure prospective clients receive timely consideration.
* Regularly communicates with prospective clients regarding application progress.
* Initiates (Private Pay) and responds to (Medicaid) all clients’ Plans of Service. Verifies draft POS for errors and communicates issues to sales staff (private pay) and state case managers (Medicaid). Ensures final accuracy of all POS.
* Records all final POS authorizations in agency enterprise software and communicates authorizations, start dates, and other POS issues to agency staff.
* Adjusts caregiver schedules as Plan of Care or client needs change. Fills open shifts.
* Coordinates all start of care activities (admission paperwork, nursing assessment) with agency staff and communicates process to client.
* Clearly communicates anticipated needs to HR Department.
* Works closely with HR Department in matching caregivers to clients. Selects most appropriate caregivers for client needs based on geography, client desires, and attribute matching and coordinates caregiver/client interviews.
* Performs in-person admissions meeting with client explain agency services, states and program requirements, understand client preferences and obtain the necessary consents and signatures.
* Records all final POS authorizations in agency enterprise software and communicates authorizations, start dates, and other POS issues to agency staff.
* Coordinates all start of care activities (admission paperwork, nursing assessment, and caregiver selection process) with agency staff and communicates process to client.
* Performs post-start-of-care and subsequent periodic phone calls to clients to ensure good client/agency communication and client satisfaction. Performs problem solving for clients as needed.
* Performs routine client maintenance activities such as processing amended or annual reauthorizations to POS. Communicates all POS amendments or reauthorizations to agency staff.
* Upon notification from agency clinical staff, client, or client’s family, assists clients needing additional services by contacting state case managers and acting as an intermediary between client and case manager, if requested. Educates clients on documentation requirements to appeal for additional services. Coordinates with agency clinical department for supporting documentation.
* Performs periodic administrative visits as required by state programs.
* Receives client complaints, records complaints into Complaint Logs in agency software, and communicates concerns to agency appropriate Agency Leadership for investigation.
* Handles caregiver concerns, complaints, and requests for reassignments. Responsible for caregiver counseling, disciplinary actions, and Performance Improvement Plans.
* Performs periodic caregiver performance evaluations and counsels caregivers accordingly.
* Manages caregiver overtime or over-authorization daily and communicates policy violations to caregivers.
* Conducts client exit interviews if leaving for another agency to determine root causes. Communicates findings to agency management.
* Performs periodic client satisfaction surveys and advises agency management on recommended improvements.
* Participates in On-Call Duty Rotation as directed by supervisor.
* Participates in agency quality assurance initiatives as directed.
* Ensures clients’ records are complete, accurate, and up-to-date in agency software and filing systems.
* Performs other client- facing activities and caregiver- facing tasks and responsibilities as directed.

| **Professional Requirements:** |
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| * Adheres to dress code, appearance is neat and clean. |
| * Collaborates well with other agency staff. |
| * Follows company policy and regulatory requirements. |
| * Maintains client confidentiality at all times. |
| * Reports to work on time and as scheduled, completes work within designated time. |
| * Wears identification while on duty, uses time system correctly. |
| * Completes in-services and returns in a timely fashion. |
| * Attends annual review and department in-services, as scheduled. |
| * Attends staff meetings regularly, reads and returns all monthly staff meeting minutes. |
| * Represents the agency in a positive and professional manner. |
| * Actively participates in performance improvement and continuous quality improvement (CQI) activities. |
| * Complies with all agency policies regarding ethical business practices. |
| * Communicates the mission, ethics and goals of the agency. |

**LANGUAGE SKILLS:**

* Able to communicate effectively in English, both verbally and in writing.
* Additional languages preferred.

**OTHER SKILLS:**

* Thorough knowledge and understanding of the functions of and regulations affecting the agency.
* Demonstrated teamwork capabilities with the ability to relate well to staff and other professionals.
* Ability to plan, coordinate, collaborate and advocate for agency clients.
* Comprehensive knowledge the state and federal guidelines and regulations governing agency.

**KEY COMPETENCIES**

**Compassion**: Genuinely cares about people; is concerned about their work and non-work problems; is available and ready to help; is sympathetic to the plight of others not as fortunate; demonstrates real empathy with the joys and pains of others.

**Composure**: Is cool under pressure; does not become defensive or irritated when times are tough; is considered mature; can be counted on to hold things together during tough times; can handle stress; is not knocked off balance by the unexpected; doesn’t show frustration when resisted or blocked; is a settling influence in a crisis.

**Customer Focus**: Is dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

**Decision Quality**: Makes good decisions (without considering how much time it takes) based upon a mixture of analysis, wisdom, experience, and judgment; most of his/her solutions and suggestions turn out to be correct and accurate when judged over time; sought out by others for advice and solutions.

**Functional/Technical Skills**: Has the functional and technical knowledge and skills to do the job at a high level of accomplishment.

**Integrity and Trust**: Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn’t misrepresent him/herself for personal gain.

**Listening**: Practices attentive and active listening; has the patience to hear people out; can accurately restate the opinions of others even when he/she disagrees.

**Organizational Agility**: Knowledge about how organizations work; knows how to get things done both through formal channels and the informal network; understands the origin and reasoning behind key policies, practices and procedures; understands the cultures of organizations.

**Priority Setting**: Spends his/her time and the time of others on what’s important; quickly zeros in on the critical few and puts the trivial aside; can quickly sense what will help or hinder accomplishing a goal; eliminates roadblocks; creates focus.

**PHYSICAL CAPABILITIES**

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| **Physical Requirements:** | Medium work **–** Exerting up to 50 lbs. of force occasionally or up to 20 lbs. of force frequently, or up to 10 lbs. of force constantly to move objects; including the human body. |
| **Visual Acuity:** | Arm's reach visual acuity **–** Worker is required to have visual acuity to perform activities such as operating machines (i.e. lathes, drill presses, power saws & mills) where the seeing job is at or within arm’s reach; performing mechanical or skilled trades tasks of a non-repetitive nature (i.e. ones by carpenters, technicians, service people, plumbers, painters, mechanics, etc.)  Close visual acuity **–** Worker is required to have close visual acuity to perform activities such as preparing & analyzing data & figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts or operation of machines (including inspection); using measurement devices; or assembly or fabrication of parts at distances close to the eyes.  General observations visual acuity **–** Worker is required to have visual acuity to determine the accuracy, neatness & thoroughness of the work assigned (i.e., custodial, food services, general labor, etc.) or to make general observations of facilities or structures (i.e., security guard, inspection, etc.)  Motor vehicle visual acuity **–** Worker is required to have visual acuity to operate motor vehicles or heavy equipment. |
| **Physical Activities:** | Balancing **–** Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or moving surfaces. This factor exceeds the amount & kind of balancing required for ordinary locomotion & maintenance of body equilibrium.  Feeling **–** Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of fingertips.  Fingering **–** Picking, pinching, typing or otherwise working, primarily with fingers rather than with whole hand or arm as in handling.  Grasping **–** Applying pressure to an object with the fingers and palm.  Hearing **–** Perceiving the nature of sounds at normal speaking levels with/without correction, & having the ability to receive detailed information through oral communication, & making fine discriminations in sound.  Kneeling **–** Bending legs at knee to come to a rest on knee or knees.  Lifting **–** Raising or moving objects/patients from a lower to higher position or horizontally from position to-position. This factor is important if it occurs to a considerable degree & requires the substantial use of the upper extremities & back muscles.  Pulling **–** Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.  Pushing **–** Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.  Reaching **–** Extending hands or arms in any direction.  Repetitive motions **–** Making substantial movements/motions of the wrists, hands, or fingers.  Standing **–** Remaining upright on the feet, particularly for sustained periods of time.  Stooping **–** Bending body downward & forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities & back muscles.  Talking **–** Expressing or exchanging ideas by means of the spoken word; those activities where detailed or important spoken instructions must be conveyed to other workers accurately, loudly, or quickly.  Walking **–** Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another. |
| **Physical Conditions:** | Exposed to Inside conditions **–** Subject to inside environmental conditions; protected from weather conditions, but not necessarily from indoor temperature changes.  Required to wear a respirator **–** Worker maybe required to wear a respirator.  Exposure to infectious disease **–** Subject to infectious diseases including blood & other potentially infectious body fluids & tissues.  Work around mental health patients – Worker maybe required to function around mental health patients.  Not exposed to adverse conditions **–** Worker is not substantially exposed to adverse environmental conditions (as in typical office or administrative work). |

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| **Acknowledgement** | | |
| I have read the above job description and fully understand the requirements set forth. I understand the agency reserves the right to revise and/or changes job duties, tasks, work hours/shifts, and work requirements at any time. I have noted below any job duties that I am not able to perform, with or without accommodation. I have also noted any accommodations that are required to enable me to perform these duties.  Comments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| Employee Print Name: | Employee Signature: | Date: |
| Supervisor Print Name: | Supervisor Signature: | Date: |