
Carolina Eye Associates, P.A.

Notice Of Position Opening

Financial Counselor/Collections/PSR

Center: Pinehurst
Status: Full-Time
Reports to: Front Desk/Surgery Sch. Supervisor

Job Summary:

Counsel and educate patients on sources of aid and assist with securing aid. Evaluate patient's financial status, as well as patient balance and establish acceptable payment plan. Receive payment from patients, post payment data, issue receipts, submit daily deposit and balance drawer.

Job Responsibilities – Financial Counselor:

1. Attempt to collect payments and establish acceptable payment plans for patients unable to meet collection policies at check-out.
2. Educate patients regarding the cost involved in delivering professional medical eye care.
3. Educate patients on what their financial responsibilities are to Carolina Eye.
4. Issue receipt & post payment data/document payment schedule.
5. Balance cash drawer & submit daily deposit.
6. Reviews accounts for possible assignment to collection agency.
7. Communicate to patient's possible sources of aid, and assist in securing aid.
8. Process Care-Credit & other various applications.
9. Perform other duties as requested and assist coworkers as needed.

Job Responsibilities – Patient Service Representative:

Check In:

1. Register new and established patients.
2. Obtain demographic and insurance information from new patients necessary to setup patient medical record in computer and chart.
3. Verify established patient's current profile information and make changes as necessary.
4. Verify patient's insurance coverage(s) and obtain any authorization numbers or necessary approval from managed care plans.
5. Request patient signature on face sheet at each patient visit.
6. Assemble and prepare chart: includes assigning chart number and labeling chart inserting face sheet, and blank treatment sheet.
7. After completely and accurately entering patient data in computer, print charge document and attach to chart.
8. Escort patients to waiting area when check-in process completed.
9. Place chart in appropriate area for patient care.

Check-Out Duties

1. Post charges and adjustments into computer as listed on charge document, and request payment for services rendered.
2. Contact Patient Care Technician if charge document information is incomplete.
3. Post payment and issue receipt.
4. Make return appointment for patient if indicated on chart.
5. Balance drawer daily (cash, charge documents, and adjustment slips).

Performance Requirements (Knowledge, Skills, & Abilities):

- Enjoy working with patients and possess an ability to relate & communicate to patients in a pleasant, professional, courteous and positive manner.
- Knowledge & understanding of the Carolina Eye billing system.
- Knowledge and understanding of covered & non-covered services provided by Carolina Eye.
- Ability to communicate various insurance carrier's payment & contractual write-off methods.
- Ability to work flexible hours; hours of work day may vary dependent upon patients schedules.
- Ability to perform basic math computations.
- Establish and maintain effective working relationship with doctors, patients, co-workers, and public.
- Skill in operating a variety of office equipment: copier, computer, calculator, telephone, fax machine.
- Ability to deliver exceptional customer service.
- Ability to speak clearly and concisely.
- Ability to maintain confidential information.
- Ability to read, understand, & follow oral and written instructions.
- Ability to answer telephone in pleasant and helpful manner.
- Ability to work Saturdays when patients are scheduled; on rotating basis.
- Ability to travel to other CEA offices if requested.
- Must be able to comply with the Employee Personnel Manual, HIPAA manual and Compliance Manual.

Typical Physical Demands:

Work in environment that requires sitting for extended periods of time. Some bending & stretching required. Working under stressful situations. Manual dexterity sufficient to operate keyboard, calculator, and other office equipment. Hearing in the normal range for telephone contacts. It is necessary to view and type on computer screens for periods of time and to work in an environment which can be stressful.

Education/Experience Requirements:

Prefer an Associate Degree in related field (Business, Accounting, etc.) or equivalent education and experience. Require 1-3 years of medical office experience performing related tasks.

Carolina Eye Associates reserves the right to change or modify job duties & essential functions at any time. Note further that the above list of job duties and essential elements is an attempt to adequately describe this position, but cannot be considered to be an exhaustive list.

If interested in applying for this position, please email current resume to Tonya Strange by close of business on Wednesday, 04/01/26. tonya.strange@carolinaeye.com