



CUSTOMER SERVICE ASSOCIATE JOB DESCRIPTION

Status: Part-Time / Non-Exempt
Hours: Monday through Thursday – 8am to 11am

Reports to: Director of Advocacy Services

POSITION SUMMARY: The Customer Service Associate (CSA) will work under the supervision of the Director of Advocacy Services with primary responsibilities of providing excellent customer service. All responsibilities relating to recording client payments and services, invoicing, and client account balances will be supervised by the Director of Advocacy Services. This position also provides support and services to administrative and program areas of the Agency. The CSA must be able to work in a team setting.

RESPONSIBILITIES:

- 1. CUSTOMER SERVICE:** The CSA will be responsible for answering the main Agency telephone and providing information/assistance to the caller. Calls will be routed to the appropriate individual or program area in a polite and efficient manner. Clients, guests, and vendors of the Agency will be greeted and taken care of with the highest level of customer service.
- 2. CLIENT SERVICES:** The CSA will be responsible for registering clients for their appointments, getting copies of any required insurance information, accurately recording all client services, and issuing receipts for payments. The CSA will work closely with the Professional Billing Clerk to ensure that invoices and statements are sent in a timely manner. The CSA will also collect vital documentation for the Clinical Intake Coordinator in regards to new clients. The CSA will also work with the BIPP Coordinator regarding all BIPP & WAV clients while properly documenting visits in Theranest.
- 3. MAIL:** The CSA will be responsible for postmarking all outgoing mail according to department in a timely manner. The CSA will hand all incoming mail to the Accounts Payable Coordinator.
- 4. FRONT LOBBY:** The CSA will be responsible for ensuring the front lobby is prepared for daily services and maintained in a neat and orderly fashion.

**Job Description
(cont.)**

5. MISCELLANEOUS: The CSA will perform all other related duties that may be assigned by the Director of Advocacy Services.

QUALIFICATIONS:

- Ability to pass a criminal background check
- High School diploma
- Bilingual (preferred)
- Valid Texas Driver's License and current auto insurance
- Working knowledge of general office equipment and machines
- Experience in Customer Service
- Excellent written and verbal communications
- Experience in MS Office Suite (Excel, Word, etc.)
- Experience in Quickbooks (preferred)

PHYSICAL REQUIREMENTS:

- Ability to lift 25 lbs.
- Ability to bend and stretch
- Ability to move from place to place
- Ability to speak and understand instructions in English
- Ability to work at a desk for extended periods of time

I have received a copy and have read the position description for this position.

Print Name

Signature

Date