

POSITION DESCRIPTION

Department: Business Office Title: Financial Counselor	
Date Created: 10/01/2025 Next Review Date: 10/01/2027	Reports to: Asst. Revenue Cycle Director Approved by: <u>AKZ</u> Brant Truman (Feb 13, 2026 18:17:32 MST) (Administrative Dept. Signature)

POSITION STATUS: ☒Hourly ☐Salaried

POSITION SUMMARY

The Financial Counselor is responsible for managing private-pay accounts and ensuring timely and accurate collections following insurance remittance. This role involves direct patient interaction, financial counseling, and coordination with internal departments and external agencies to support the hospital’s revenue cycle operations.

DUTIES & RESPONSIBILITIES

- Perform collections on private-pay accounts in accordance with hospital credit and collection policies.
- Review and process Charity Care applications including financial evaluations, spreadsheet entry, system write-offs, and submission to the Assistant Revenue Cycle Director.
- Prepare and submit monthly lists of accounts to designated collection agencies after appropriate approvals.
- Establish financial arrangements with uninsured patients, including in-house consultation with current inpatients.
- Process itemized bills for private-pay patients and responding to billing inquiries with professionalism and accuracy.
- Execute necessary account adjustments and refunds.
- Assist patients with insurance applications and renewals through the Health Plan Finder.
- Monitor bankruptcy notifications and maintaining accurate records.
- Print and mail pre-collect and final collection letters.
- Manage monthly vendor statements and participating in continuous Quality Improvement initiatives.
- Engage in ongoing in-service education to enhance job performance.
- Perform general office duties such as filing and other tasks assigned by supervisor.

QUALIFICATIONS

- High School Diploma GED Required.
- Comprehensive knowledge of physician and/or hospital facility insurance and self-pay processes.
- Experience with accounts receivable, contract reimbursement, denials management, claims appeals, claim follow-up, refunds, and credit balance review and processing.
- Ability to read, write, and understand English.
- Spanish Speaking preferred.
- Advanced computer skills, working in multiple systems and proficient in Microsoft Office applications.
- Knowledge of Revenue Cycle Functions.
- Knowledge of medical terminology.
- Excellent and demonstrated communication skills including telephone, listening, writing, and oral.



Our Values

The Values at Lake Chelan Health provide fundamental guidance to all staff in creating an exemplary patient experience and a wonderful environment for staff to care for our community. The Values of Lake Chelan Health ensure we consistently meet our Mission: *To Provide the highest quality healthcare with compassion and respect to the community we serve.* The Values at Lake Chelan Health Support our just culture – one of an accountable organization, that develops strong systems, treats all staff with respect and equity, and encourages employees to take responsibility for their choices while reporting errors and system vulnerabilities. Our values guide the way we interact with our employees across all levels and disciplines – framing the way we interact with our patients.

Vision: To improve community health and make our region a better place to live.

Mission: To provide the highest quality healthcare with compassion and respect to the community we serve.

Values: Relationships, Integrity, Compassion, Respect, Excellence

Relationships

We hold relationships as a foundational value for all interactions. We seek first to understand in all relationships- patients, coworkers, and our community.

At Lake Chelan Health we will:

- Place the highest value on developing and maintain sincere relationships with those we interact with.
- Expect more from ourselves than we expect from others.
- Empower each other to carry out tasks and actions.
- Foster growth and improvement in our peers and our teams
- Include those closest to the problem when making decisions.
- Create a working environment that encourages working to the "top of one's license"
- Seek to create a working environment that we enjoy, and patients trust.

Integrity

We demonstrate strong behavioral and ethical standards. We are accountable to our patients, our peers, and our community to these high standards in all our actions.

At Lake Chelan Health we will:

- Always do the right thing for our patients and their families.
- Work to earn the trust of those we serve.
- Communicate in an open and honest manner with the highest of ethical standards.
- Trust others while seeking, allowing, and expecting open and honest feedback.

Compassion

We treat every interaction with compassion, valuing every experience and story that our patients and their families bring with them. We seek to heal the whole person.

At Lake Chelan Health we will:

- Treat each patient, family, and caregivers with kindness and caring.
- Be respectful and understanding of the needs of our diverse community.
- Treat all of those we serve with humility, equity, and understanding.
- Provide care with grace and humanity.

Respect

We place a priority on equality and inclusion on a daily basis, honoring the dignity and worth of each individual.

At Lake Chelan Health we will:

- Honor our differences, regardless of issue.
- Celebrate the accomplishments of those we work with.
- Interact with humility and understanding.
- Be open minded and appreciate the perspectives and life experiences of all.
- Acknowledge and celebrate diversity in our community and our organization.
- Encourage transparency – encourage constructive identification of problems and take concerns directly to those involved.
- Communicate expectations clearly, dealing with content not assumptions.

Excellence

We demonstrate a full commitment to providing the highest level of quality and value in all aspects of our work, including operational, clinical, governance, financial, and relational.

At Lake Chelan Health we will:

- Expect quality and excellence for ourselves and those we interact with.
- Exemplify a just culture by focusing on improving systems – and treating staff equitably.
- Report errors, systems issues and provide solutions to improve, and not blame.
- Seek opportunities for continuous improvement in all our works.
- Use education and training as the foundation for improvement.

PHYSICAL REQUIREMENTS ANALYSIS

Department: Business Office

Job Title: Financial Counselor

Mark all responses using the following codes:

N = Never

O = Occasionally, represents 1 to 33% or 1 to 2 hours of an 8-hour workday

F = Frequently, represents 34 to 66% or 2.5 to 5.5 hours of an 8-hour workday

C = Continuously, represents 67 to 100% or 6 to 8 hours of an 8-hour workday

N	O	F	C	PHYSICAL ACTIVITY
☐	☒	☐	☐	Walking
☐	☐	☒	☐	Sitting/Standing
☐	☐	☒	☐	Reaching: Shoulder Height
☐	☒	☐	☐	Above Shoulder Height
☐	☒	☐	☐	Below Shoulder Height
☐	☒	☐	☐	Climbing
☐	☒	☐	☐	Pulling/Pushing: 25 pounds or less
☐	☒	☐	☐	25-50 pounds
☒	☐	☐	☐	Over 50 pounds
☐	☒	☐	☐	Lifting: 25 pounds or less
☐	☒	☐	☐	25-50 pounds
☒	☐	☐	☐	Over 50 pounds
☐	☒	☐	☐	Carrying: 25 pounds or less
☐	☒	☐	☐	25-50 pounds
☒	☐	☐	☐	Over 50 pounds
☐	☒	☐	☐	Crawling/Kneeling
☐	☒	☐	☐	Bending/Stooping/Crouching
☒	☐	☐	☐	Twisting/Turning
☐	☐	☒	☐	Repetitive Movement

PHYSICAL EXPOSURE: (mark where applicable with "X")

☐ Unprotected heights

Harmful physical agents:

Lighting: ☐ Bright

☐ Heat/Cold

☐ Dim

☒ Noise

☐ Mechanical hazards

☐ Ionizing/non-ionizing radiation

☐ Hazardous substances

☐ Infectious diseases

ACCEPTABLE MINIMUM PHYSICAL ABILITY:

Vision:

☐ Good

☒ Correctable

☐ Blind

Color Vision:

☐ Normal

☒ Impaired

Hearing:

☒ Normal

☐ Moderate Loss

☐ Deaf

Manual Dexterity:

☒ Good

☐ Fair

Talking/Speech:

☒ Normal

☐ Moderate Loss

☐ Mute

DISCLAIMER STATEMENT

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of personnel so classified, nor do they address the performance standards that must be maintained.

EMPLOYEE:

I have read and understand the duties and responsibilities of this position. I have reviewed and agree to the contents of this position description, and I am able to perform the job functions and meet the physical requirements without restriction(s):

Employee Signature

Date

Job Description: Financial Counselor Feb 2026

Final Audit Report

2026-02-14

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