



## **Client Engagement Specialist** at Canopy Mental Health & Consulting (MHC)

The Client Engagement Specialist plays a key role in creating a welcoming and supportive experience for clients seeking services at Canopy. As a primary point of contact for prospective and current clients, this role is responsible for managing incoming communications, supporting client-provider matching, and coordinating scheduling and administrative processes that help clients access services. The Client Engagement Specialist works closely with clinicians and the administrative team to ensure timely communication, accurate documentation, and smooth coordination of client services. This position reports to the Administrative Supervisor.

### **Job Details**

- Start Date: As soon as possible
- Location: Remote
- Hourly Rate: \$9-13
- Hours/Days: Monday-Friday, 8 hours per day; estimated to be 9am-5pm CST; availability will need to be in alignment with Minnesota, USA business hours.

### **Key Responsibilities**

#### **Client Experience & Service Delivery**

- Deliver high-quality, client-centered communication and customer service to new and existing Canopy clients
- Respond promptly to incoming inquiries via phone, email, eFax, and Electronic Health Record (EHR) messaging as a primary point of contact for client communication
- Triage client communications and direct requests to appropriate clinicians or staff to ensure timely follow-up and care coordination
- Support clients in identifying and connecting with appropriate providers based on client needs and service availability
- Communicate clearly and professionally with clients, ensuring timely follow-through and resolution of concerns across all communication channels
- Maintain composure and professionalism while navigating complex or high-stress client situations
- Coordinate follow-up appointments and ongoing scheduling needs for existing clients
- Distribute and track client satisfaction surveys to support continuous improvement of the client experience and report relevant trends of feedback to the Administrative Supervisor

#### **Administrative Systems & Operations**

- Coordinate clinician scheduling by organizing and maintaining provider calendars and appointment availability
- In collaboration with the administrative team, maintain accurate provider profile information, including scope of practice, specialties, and services offered
- Schedule new client intake appointments and distribute required intake documentation through Canopy's Electronic Health Record (EHR) system while aligning client needs with appropriate provider specialties and service areas.

- Arrange interpretation services as needed to support equitable client access to care
- Provide reminder calls for psychiatric provider appointments to support continuity of care
- Accurately record and maintain client information across administrative systems
- Participate in weekly Administrative Team meetings led by the Administrative Supervisor
- Perform other duties as assigned to support administrative team operations and organizational needs

#### Data & Administrative Operations

- Review client intake documentation to ensure accuracy and completion prior to initial appointments and follow up with clients when additional information or corrections are required
- Upload, organize, and maintain client documentation within the EHR system in accordance with organizational documentation standards
- Facilitate the secure exchange of medical and mental health records as requested by coordinating with clients, providers, and external organizations and verifying appropriate Release of Information (ROI) documentation
- Monitor administrative documentation workflows to ensure required client forms, records, and supporting documents are received and properly filed prior to appointments

#### Client Support & Billing Coordination

- Collect client payments and assist clients with payment processes including processing payments, documenting transactions, and answering basic client questions about payment procedures while directing more complex billing questions to the billing team
- Coordinate with the billing team to verify insurance eligibility for clients and inform clients about scheduling next steps
- Provide clients with appointment logistics and instructions, including telehealth access details, office location information, and other guidance needed to attend scheduled services
- Maintain accurate records of client payment activity and billing-related communication with administrative systems and the EHR

#### Compliance & Confidentiality

- Maintain strict client confidentiality in accordance with the Health Insurance Portability and Accountability Act (HIPAA)
- Ensure appropriate Release of Information (ROI) documentation is completed prior to sharing client records with authorized parties and confirm documentation is properly recorded in the EHR
- Complete and maintain required annual HIPAA training and follow organizational procedures for secure handling, storage, and transmission of client information
- Use secure communication practices when handling client information, including phone, email, fax, and EHR messaging systems
- Promptly report potential privacy or confidentiality concerns to the Administrative Supervisor

## **Requirements**

*While we have identified specific requirements for this role, we acknowledge that not all candidates may possess every requirement listed. We encourage all applicants who believe they possess the necessary skills and experience to perform the role satisfactorily to apply, regardless of whether they meet each requirement to the fullest extent.*

### **Required Qualifications:**

- High school diploma or equivalent education
- 1-2 years of administrative assistant/coordinator experience
- Experience working in health care or human services
- Passionate and knowledgeable about providing culturally responsive services, equitable healthcare access, and social and economic challenges of the communities that Canopy serves
- Must have at least basic knowledge of insurance billing processes (CPT codes, diagnostic codes, use of modifiers, etc.)
  - Access to a private and quiet space to take and receive phone calls while maintaining client confidentiality
  - Access to reliable home internet service with minimum speed of 100Mbps download and 25 Mbps upload and VPN connectivity.

### **Preferred Qualifications:**

- Beginning to Intermediate knowledge of insurance billing processes (CPT codes, diagnostic codes, use of modifiers, etc.) and electronic health record systems
- Knowledgeable about mental health symptoms/diagnoses, coordination of care, referrals, best practices, HIPAA compliance, insurance, billing, and other areas of mental health care
- Knowledge of appropriate software including: Google Workspace, WebEx and Adobe Acrobat