

**Title: Financial Management Support Specialist (FMSS) – Non-Exempt**

**Job Summary:**

Under the direction of the FMSS Manager, the FMS Specialist provides customer service support to FMSS clients, is responsible for new client intake, new program transition, transfers, budgeting, and expense reporting services in accordance with program guidelines and State regulations, providing resources and information to current and potential clients and Case Managers.

**Job Qualifications:**

**Education:** FMS Specialists must have a high school diploma or equivalency plus additional training or education in a related field from a college, university, or technical school. Specialized education in accounting, business, health care administration or social services preferred.

**Experience:** Two years of experience in accounting and data entry in a high-volume position preferred. Experience in a social services organization and with persons with disabilities a plus.

**Skills:** High speed data entry using standard accounting-type software with a typing speed of approximately 40+ words per minute. Ability to create and use Excel spreadsheets. Ability to create and use Word documents. Ability to compose short memos with correct grammar, clear meaning, and accurate spelling. Ability to speak to clients by phone using correct grammar, reflective listening, and receive and document information accurately. Ability to maintain composure when addressing clients about problems. Ability to organize multiple tasks and track and assure completion. Ability to execute simple math equations, including percentages. Skilled in effective interactions with people with disabilities. Bilingual – Spanish/English or other language preferred, with fluent ability to speak and understand.

**Other:** Reliable transportation, proof of auto liability coverage, and a valid driver’s license required. Must be able to pass criminal background check and pre-employment drug screen per agency licensing agreements.

**Environmental and Working Conditions:**

Work between remote and office as required, promoting efficient functioning and coordination of all agency activities to ensure the highest level of professionalism. Will need to be flexible with work schedule and periodically work extended hours. High call volume. Must have ability to travel locally and occasionally across the state to meet with new clients. Comfortable meeting new people in their homes with different capacities.

**Physical and Mental Effort:**

Visual/hearing ability sufficient to comprehend written/verbal communication. Able to deal effectively with stress. Meet requirements of agency infection control policies. Work requires the physical demands of sitting, standing, bending, lifting, stooping, or performing other work requiring light physical exertion on an intermittent basis.

**Essential Functions:**

- Interact with clients via telephone to answer questions and solve problems. Prepare memos to clients as needed to advise clients of over-utilization of funds or lapses in authorization. Send communications in required format to advise case managers of issues with client utilization of services or changes in client condition, hospitalization, etc. Accurately Document all in all HRA Systems.
- Respond to requests for information from consumers about the CDS program. Schedule appointments for new client intakes, make travel plans and maintain documentation of travel expenses.
- Independently perform client enrollments and intakes virtually and in client homes. Conduct pre-enrollment and eligibility activities for CDS participants, including development of client budgets. Prepare and explain all intakes and new hire packets to clients. Maintain new client contact and follow-up to assure smooth initiation of services and transition CDS program.
- Accurately enter and maintain all assigned client records in agency database, email and communication files.
- Maintain current knowledge of the requirements and regulations governing assigned programs by reading Provider Letters, Handbooks and attending workshops, meetings and training sessions.
- Ensure that all services presented for payment are within budget and billable.
- Coordinate with Billing Departments to research discrepancies and solve problems.

<ul style="list-style-type: none"> <li>Respond to disputes or complaints submitted by HHSC and/or the client in the manner prescribed by agency procedure.</li> </ul>
<ul style="list-style-type: none"> <li>Prepare client quarterly budget reports, including accurate detailed memos advising clients regarding under or over-usage. Prepare Corrective Action Plans for clients with significant or repeated under- or over-usage of services according to State procedures. Follow up with clients in a timely manner to ensure that problems are addressed and resolved. Inform Director of CDS of all client service problems and pending problems. Prepare yearly budget reports as clients' authorizations have ended.</li> </ul>
<ul style="list-style-type: none"> <li>Tracking and Following up with Case Mangers for authorizations as required for renewals and revisions in TMHP and other portals. Monitor incoming communications from case managers for both new and existing clients and process to meet goals for timeliness and accuracy.</li> </ul>
<ul style="list-style-type: none"> <li>Send communications to case managers to document needs for updated authorizations and IPC's or to correct problems. Follow-up systematically to ensure resolution.</li> </ul>
<ul style="list-style-type: none"> <li>Respond to case manager/service coordinators requests for start of care (SOC) dates and transfer request to ensure client services begin and end as seamless as possible and to ensure that the agency is reimbursed correctly for all services</li> </ul>
<ul style="list-style-type: none"> <li>Monitor incoming communications from case managers for new clients, HHSC and TMHP and process to meet goals for timeliness and accuracy. Follow-up systematically to ensure resolution. Communicate status to client. Ensure no service begins before authorization. Initiate new client records according to required procedures and format in client database and paper files.</li> </ul>
<ul style="list-style-type: none"> <li>Analyze budgets and quarterly report requests according to procedures and policies</li> </ul>
<ul style="list-style-type: none"> <li>Attend meetings and training sessions as required to assist with continuous improvement of organizational processes and increase personal knowledge and skills. Assist with the quality improvement programs by monitoring all aspects of assigned programs and implement program modifications where indicated.</li> </ul>
<ul style="list-style-type: none"> <li>Advocate and inform current and potential clients about other resources in the community.</li> </ul>
<ul style="list-style-type: none"> <li>Carry out other duties as assigned.</li> </ul>

**Statement of Understanding:** I have read the above job description and essential functions. I understand and agree to carry out these responsibilities as assigned. I understand and acknowledge that nothing contained in this job description may be construed as limiting the employer's right to discipline or terminate my employment at any time for failure to perform satisfactorily.

Employee's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Manager's Signature: \_\_\_\_\_

Date: \_\_\_\_\_