



JOB DESCRIPTION

TITLE
DIVISION
REPORTS TO
CLASSIFICATION

PATIENT ENGAGEMENT SPECIALIST
Patient Services
Patient Services Director
Full Time (Monday-Friday)

JOB PURPOSE

The Patient Engagement Specialist is responsible for maintaining excellence and accuracy in the Follow-Up and Data Entry processes, managing patient appointments using appropriate scripts and procedures, and ensuring the integrity and organization of all patient-related documentation across office locations. This role serves as a key liaison for ongoing patient contact, effective scheduling, and administrative support, contributing to a high-quality, compassionate patient experience.

JOB RESPONSIBILITIES

PROGRAM RESPONSIBILITIES

1. Answer phone call inquiries about our services and connect or refer them to support resources.
2. Schedule patient appointments using established scripts and procedures.
3. Ensure completion of all scheduling tasks, including:
 - a. Entry of qualified appointment details into the Center database (from the Scheduling Line Intake Form).
 - i. Non-qualified calls are documented into a Call Log
 - b. Entry of appointment information into the Center online scheduler calendar.
 - c. Management of appointment waiting lists as needed.
 - d. Rescheduling appointments as directed by office staff.
 - e. Manage reminder calls and text system
4. Complete follow up calls from patient appointments providing resources and referrals as appropriate, including scheduling follow up appointments.
5. Maintain, update, and record the Center's voicemail message (e.g., holiday hours, weather closings) and respond to patient messages promptly.
6. Audit and maintain patient charts, ensuring accurate and up-to-date documentation.
7. Reconcile and track statistics for all patients.
8. Enter data related to extra patient contact beyond the normal follow-up process.
9. Complete and coordinate:
 - a. Follow-up calls.
 - b. Shift Opening Responsibilities.
 - c. No Show Contacts.
10. Support staff with data entry processes by providing training and technical assistance.
11. Supports Executive Director and Leadership Team by creating consolidated Monthly Data Reports.

PERSONNEL RESPONSIBILITIES

1. Provide support and leadership to the receptionist.
2. Coordinate with all staff performing follow-up calls and data entry tasks to ensure consistency and accuracy.
3. Provide coverage as a Patient Advocate when necessary.

FISCAL RESPONSIBILITIES

1. This role does not include any direct fiscal responsibilities.

COMMUNITY RESPONSIBILITIES

1. Represent the organization by attending community events as requested by the Executive Director.

OTHER RESPONSIBILITIES

1. Maintain and update the standard operating procedures and processes for the areas you are responsible for.
2. Maintain and update our Referral list.
3. Attend all required staff and volunteer meetings.
4. Assist with fundraising events and all-staff events as needed.

QUALIFICATIONS

1. A personal relationship with Jesus Christ and alignment with the organization's Christian, pro-life mission and Statement of Faith.
2. High School Diploma/GED Required
3. Excellent written and verbal communication skills.
4. Self-motivated, detail-oriented, and able to manage multiple responsibilities and deadlines.
5. Demonstrates strong attention to detail.
6. Possesses excellent communication skills, both written and verbal.
7. Has adequate computer proficiency, including data entry and calendar management.
8. Is organized, reliable, and able to manage multiple tasks with efficiency.
9. Capable of working independently and collaboratively in a team setting.
10. Demonstrates compassion and professionalism in patient interactions.

CERTIFICATION

The Patient Engagement Specialist performs other duties as assigned for the benefit of CPC and its mission. This job description is not designed to cover or contain a comprehensive listing all activities, duties and responsibilities that are required for the employee.

The Employee's signature below indicates that the employee has reviewed and received a copy of this job description.

Employee Signature _____ Date _____

Employer Signature _____ Date _____