



<b>Job title</b>	<i>Onboarding Specialist</i>
<b>Reports to</b>	<i>Client Relationship Manager</i>

### Job purpose

Maintains and creates the proposals and contracts to be presented to Clients. Gathers and stores all data used for and by the facilities.

### Duties and responsibilities

1. Prepare proposals for clients
  - Works directly with internal leadership to present proposals
  - Serve as liaison between AGS leadership and client to finalize pricing
  - Follow up on all outstanding proposals until lead is either approved or declined
2. Prepare contracts
  - Oversee the contracts to ensure it the data is correct and up to date
  - Present to supervisor the completed contract for approval and present to client once finalized.
  - Maintain internal tracking system
3. Gather relevant client information so all internal stakeholders can access up to date data
  - Gather needed documentation for the onboarding process
  - Maintain AMP data (Master entity details and Contracts and agreements)
  - Complete facility related forms (e.g. W-9, Tax Pin, Hirsch Tax, Entity name changes)
  - Maintain all contracts, proposal, and leases (e.g. Medicaid and Medicare contracts, VA renewals, and administrators changes)
  - Keep direct manager informed about deadlines or obstacles to completing work
4. Other duties as assigned

### Qualifications

A successful individual in this role will:

- Have basic computer knowledge and communication skills

Specific requirements:

- Able to prioritize and meet deadlines
- Able to operate independently
- Attentive to detail
- Organized
- Able to learn new systems and policies
- Possess excellent verbal and written communication skills

### Working conditions



This job occurs in an office environment with mostly sedentary work. The role requires frequent interaction with fellow coworkers, as well as focused concentration at a computer work station.

**Physical requirements**

This role has no specific physical requirements.

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<b>Approved by:</b>	_____
<b>Date approved:</b>	_____
<b>Next annual review:</b>	_____