

Meghan Montalvo-Weiner

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SKILLS

- Event Planning
- Customer Service
- Time Management
- Social Media Management
- Direct Communication
- Microsoft Office Proficiency

EXPERIENCE

THE MIDLAND GROUP

Financial Counselor

Rapid City, SD
Feb 2022 – June 2022

- In charge of documenting, filing, and organizing patient financial records and payment plans
- Obtained patient information and medical records to file public benefit applications for financial aid
- Noted phone calls with hospital case manager, patient exchanges, and case status updates into 4D software
- Navigate EPIC to locate patient medical records as needed and visit patients in hospital using designated badge ID

COOK, BRADFORD, & LEVY LLC

Legal Assistant

Lafayette, CO
Sept 2021 – Feb 2022

- Assisted with new prospective client by scheduling intakes through Zoom and/or in-person
- Drafted documents for new & ongoing clients including Letters of Representation and C.R.S. §10-3-1117
- Noted phone calls with insurance adjustors, email exchanges with clients, & medical records into clients' folders
- Used Clio and Captorra to ensure attorneys were up to date with ongoing meetings and events
- Order clients' medical records using Xebec as well as ordering balance confirmations from medical offices
- Handles the organization of gathering all documents needed to draft and send settlement demand to adjustors

FLORIDA CANCER SPECIALISTS - RX TO GO

Pharmacy Intake Representative - Remote

Fort Myers, FL
Feb 2020 – Sept 2021

- Made outbound calls to patients and specialty pharmacies to coordinate status of medication deliveries
- Navigated & documented phone calls, email exchanges and faxes into patients' charts using CPR+/ORCA/ONCO EMR
- Answered calls from a queue to address & answer patients' questions politely while following HIPAA regulations
- In charge of tracking an email group consisting of other team members to ensure completion of tasks in timely manner
- Communicated with patients and clinics on status updates of medication from other specialty pharmacies
- Handles the scanning and sorting of faxes as well as delivering messages via phone / email / or letters.

EQUINOX SMASH

Administrative Assistant

Fort Myers, FL
May 2014 – Aug 2021

- Handles all organization of paperwork through data entry, filing, scanning, printing, and creating folders.
- Maintains schedule of appointments, interviews, planning events, securing a venue, and conferences.
- Prepares memos, email newsletters and graphics sent out to event attendees.
- Takes care of phone calls with excellent customer service as well as directing to appropriate sources.
- Knowledge of software such as Outlook, Word, PowerPoint, Google Docs, Quickbooks, and Gmail

EYE CENTERS OF FLORIDA

Sugicare Receptionist

Fort Myers, FL
Sept 2019 – March 2020

- Welcomes patients and visitors in person, on the telephone by answering or referring inquiries
- Performing general administrative support work such as running reports, copying, filing, and faxing
- Verify patient paperwork for completion and scan documents, insurance card(s) and photo identification into computer
- Maintain strictest confidentiality in accordance with HIPAA compliance
- Relied on to keep a neat and orderly work environment and the ability to multi-task and organize

FAMILY HEALTH CENTERS OF SOUTHWEST FLORIDA

Patient Data Coordinator

Fort Myers, FL
September 2017 – May 2019

- Made outbound calls to patients to encourage them to come in to satisfy HEDIS insurance measures
- Used an electronic health system (EHR) to create and confirm appointments for patients
- Analyzed spreadsheet reports from insurance companies to identify patients who need to be contacted for appointments
- Tracked all patient contact methods in a weekly report and monthly meetings for validity