

Branch Manager

Local branch operations, waiver intake, growth, leadership, and client satisfaction

Department	Client Services
Reports To	Director of Client Services
FLSA Status	Full-Time, Exempt

Position Summary

The Branch Manager owns the day-to-day operational success and responsible growth of an assigned branch. The position leads local staff, develops waiver referrals, assesses operational capacity, oversees service delivery and client satisfaction, conducts on-site onboarding, manages escalated concerns, and ensures the branch completes compliance corrections as identified by Compliance, Leadership, or HR.

Primary purpose: Operate and grow the local branch while ensuring employees are supported, clients receive reliable services, and required corrections are completed promptly.

Essential Duties and Responsibilities

Branch Operations and Growth

- Direct daily branch priorities, staffing performance, service coverage, complaint escalations, and operational follow-up.
- Develop local waiver referral relationships and manage the branch's portion of waiver intake from referral through internal handoff and service start.
- Assess staffing capacity before committing to service and communicate realistic start expectations.
- Establish branch census, retention, utilization, and community-development plans with the Director of Client Services.

Employee Leadership and On-Site Onboarding

- Participate in local interviews and recommend candidates in coordination with HR.
- Conduct on-site onboarding, branch orientation, workflow training, introductions, and position-specific expectations.
- Provide daily supervision, coaching, one-on-ones, performance evaluations, and workload support.
- Address caregiver performance and conduct concerns in partnership with HR when formal discipline, investigation, leave, accommodation, or termination processes are involved.

Client Service and Escalation

- Monitor client satisfaction, service continuity, staffing barriers, complaint resolution, and waiver coordinator concerns.
- Serve as the first management escalation for unresolved Service Coordinator issues and high-risk operational concerns.
- Investigate, report and document ANE allegations to the fullest extent alongside appropriate HR, compliance and clinical team members.
- Ensure quarterly reviews, progress reporting, complaint submissions, incident reporting and required branch documentation are completed on time.
- Escalate clinical, reportability, authorization, compliance, employment, or legal concerns to the appropriate department.

Quality and Cross-Functional Accountability

- Review branch metrics and conduct operational spot checks without replacing independent QA review.
- Ensure branch staff respond to QA deficiencies and implement corrections as directed by Compliance or other applicable leadership.
- Route statewide home health referrals to Central Intake and collaborate regarding local staffing capacity; Clinical Leadership retains clinical appropriateness and RN assignment authority.
- Report resource needs, performance risks, and growth opportunities to the Director of Client Services.

Supervisory Responsibilities

- Supervises assigned Lead Service Coordinators, Service Coordinators, and other branch staff.
- Conducts onboarding, coaching, one-on-ones, evaluations, and operational performance management.
- Partners with HR on formal discipline, investigations, leave, accommodation, and employment administration.

Role Boundaries and Cross-Functional Coordination

PRIMARY OWNERSHIP	PARTNERS CLOSELY WITH	DOES NOT INDEPENDENTLY OWN
• Local branch operations	• Director of Client Services	• Corporate employment administration
• Local waiver referral development	• Corporate HR	• Independent QA approval or compliance investigation
• On-site onboarding and daily supervision	• Authorization and QA Managers	• Home health clinical acceptance or RN assignment
• Service delivery and client satisfaction	• Central Intake	• Authorization processing
• Branch growth and operational correction	• Clinical Leadership/RN Team • Recruiting and community partners	• Enterprise policy ownership

Minimum Qualifications

- High school diploma or GED.
- Valid and active driver's license and ability to be insured under the company automobile insurance policy.
- At least five (5) years of documented home care, home health, healthcare operations, scheduling, branch management, client services, or related experience in a direct supervisory, lead or management position.
- Ability to travel locally and conduct client, employee, referral-source, and branch visits.
- Demonstrated strong understanding of staffing, service coordination, client escalation, documentation accountability, and workforce leadership.

Preferred Qualifications

- Associate or bachelor's degree in healthcare administration, business, social services, nursing, or a related field or job-related equivalent experience.
- CNA, HHA, or other relevant direct-care credential or experience.
- Experience with Indiana Medicaid HCBS and home health service delivery.
- Experience with business development or census growth.

Core Competencies

- Local leadership
- Operational ownership
- Growth and relationship development
- Employee coaching
- Client service recovery
- Sound escalation
- Workforce planning
- Accountability and follow-through

Work Environment and Physical Requirements

- Ability to work for extended periods at a computer and communicate by telephone, video, and in person.
- Ability to travel between work locations, client homes, community locations, or meetings as required by the role.
- Ability to maintain confidentiality and safeguard protected health and employment information.
- Ability to manage competing priorities in a fast-paced home- and community-based services environment.

Key Performance Indicators

- Branch census and referral conversion
- Client and caregiver retention
- Authorized hours delivered and unfilled shifts
- Client satisfaction and complaint resolution
- Quarterly review and reporting completion
- Onboarding effectiveness and staff performance
- QA correction turnaround
- Branch productivity and escalation resolution

Acknowledgment

This job description describes the general nature and level of work expected. It is not an exhaustive list of all duties. Responsibilities may be modified based on organizational needs, applicable requirements, and reasonable business considerations. Nothing in this document changes the at-will nature of employment where applicable.

Employee Name: _____

Employee Signature

Date