Initial Screening Assessment

Intake Ops L3 Q3 2025 - POCKETRN

Introduction

IMPORTANT!

Candidates must be legally authorized to work in the U.S. without employer sponsorship, now or in the future, even if granted from another employer or spouse. **We only accept candidates who are U.S. citizens, hold a Green Card, or have high certainty of receiving a Green Card within 90 days**.

This document explains what you can expect for your first interview. Please read carefully so that you are properly prepared for it.

You will join a Zoom meeting to conduct a simulated phone call for this interview.

As part of your interview for the Intake / Intake Operations role, you will participate in two exercises during the initial interview designed to simulate key aspects of the work you would be performing in this role. These exercises allow us to evaluate both your ability to handle real-world scenarios and your approach to communication, organization, and process management.

Exercise 1: Simulated Intake Call & Partner Email
If your video is on for the Zoom meeting, we will have you turn it off for this portion. This exercise simulates a real-world intake scenario with a prospective client or their loved one as if from a phone call. During the exercise, you will need to:

- Gather complete and accurate information by asking clarifying questions.
- Record the information in an intake form.
- Identify potential red flags or missing information.
- Draft a professional email to a partner informing them that the client has decided not to move forward with the program.

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This exercise allows us to assess your attention to detail, verbal and written communication skills, professionalism, empathy, and ability to navigate ambiguous or incomplete information.

Exercise 2: Tracking Pending Items & Partner Communication

This exercise simulates the operational side of intake, focusing on tracking required items for patient alignment and ensuring effective communication with partners and internal teams. At the time of the interview, you will be provided with a mock patient file containing required items, some of which are missing, incomplete, or delayed. You will need to:

- Draft professional communication (email or call script) to the appropriate partner(s) to request missing items.
- Describe how you would track, escalate, and communicate internally about outstanding items to ensure teams are aligned.
- Prioritize outreach and follow-up if multiple items or patients are pending.

This exercise allows us to evaluate your organizational skills, process orientation, attention to detail, professional communication, and ability to manage follow-up and escalation effectively.

About the interview process

You don't have to read this section, but if you're curious, here's our interview process:

- **Technical Interview (30 min):** We'll schedule a virtual interview to go over the simulation described above. Be somewhere quiet, with a stable internet connection. We'll dig deeper into your assessment to see how you communicate and defend your ideas.
- **Behavioral Interview (30-45 min):** If the interview goes well, we'll invite you to a behavioral interview focused on cultural fit, guided by PocketRN's values.
- **Possible Manager/Director/Executive Interview:** Occasionally, we schedule a third interview with either your manager, director, or an executive. This usually only happens if we're stuck choosing between equally strong candidates. We don't plan these ahead, so we can't say exactly what they'll look like.
- **Reference Calls:** We will ask you to provide us the contact information of two references that we will call. Ideally, from your most recent work experience, and ideally one would be your manager.
- **Offer:** If you're our top choice, we'll send you an offer with clear details about your role and compensation. You'll have reasonable time to decide, but we might need to move quickly if other strong candidates are waiting.
- **Background check:** We run a background check after you've accepted the offer. We do this for all employees as is required by some of our clients. If we find anything suspicious, we will talk to you about it, but we may rescind the offer.

More details are provided at each step and we aim to be flexible, so if you have specific needs or questions, let us know!