

**LIFE MANAGEMENT CENTER OF NORTHWEST FLORIDA, INC.
JOB DESCRIPTION**

DATE ESTABLISHED: 09/09/2015

DATE REVISED: 03/01/2021

DATE REVIEWED: 08/27/2021

DATE APPROVED: 03/01/2021

TITLE OF POSITION: Administrative Assistant

POSITION NUMBER: AD-00

PROGRAM: Bay

COMPONENT: Adult Services

MINIMUM TRAINING, CREDENTIALS AND EXPERIENCE REQUIRED: High school diploma or equivalency. All employees are required to have basic computer skills. These basic skills will include knowledge of creating folders, saving and retrieving files, e-mail (Outlook), MS Office (Word and Excel), using web browsers such as Internet Explorer and/or Mozilla Firefox, along with operating a keyboard, mouse, and printer.

Compliance with minimum standards for screening of mental health personnel as contained in F.S. 394.4572.

SUPERVISOR: Adult Services Office Manager

POSITIONS SUPERVISED: None

WAGE AND HOUR STATUS: Non-exempt

DESCRIPTION OF DUTIES AND RESPONSIBILITIES: *

ESSENTIAL FUNCTIONS: (Essential functions of this position are listed below. The position also includes additional functions as needed and/or assigned by supervisor.)

1. Verifies client insurance benefits, applicable copayment, and any balances due prior to the appointment.
2. Sends appointment reminders to clients per client preference.
3. Arranges for and documents use of interpreter services, or other auxiliary aids as necessary to ensure effective communication and access.
4. Manages appointments and follows program procedures for client check-in.
5. Updates client status and notifies appropriate staff of appointment arrivals, cancellations, and breaks.

*Expectations regarding quality and quantity of work are further delineated in the criteria-based performance appraisal.

6. Communicates relevant client status information in the comments of an Appointment or in Client Warnings.
7. Requests and collects the client's current information at each visit. This includes demographics (*address, phone number, email address, insurance information, etc.*), screening tools (*PHQ-9, GAD-7, etc.*), and external forms (*voter registration forms, client satisfaction surveys, etc.*).
8. Performs moderately complex typing and clerical work.
9. Updates client data in the Electronic Health Record.
10. Scans client documents in a timely manner.
11. Files scanned documents in accordance with LMC guidelines "Document Naming Convention" and "Folder List and Content".
12. Records and processes Release of Information forms in a timely manner.
13. Arranges for good communication by documenting when placing client phone calls and reasons for placing the calls.
14. Performs administrative functions of accurately opening and closing client records per LMC policy.
15. Coordinates coverage with Supervisor and coworkers for clinic schedules.
16. Cross trains in other administrative positions in order to fill in for support of staff during high volume client attendance, staff absences, and staff lunch.
17. Greets clients, companions, vendors, and staff in a courteous and timely manner.
18. Practices proper phone etiquette (*is polite, uses friendly greeting, takes responsibility for solving problems, etc.*)
19. Manages phone traffic effectively (*proficient in phone operation- transferring calls, placing calls on hold, etc.*)
20. Assesses for and responds appropriately to client risk situations/events.
21. References client "Warnings" related to safety, and updates as needed
22. Uses appropriate de-escalation techniques when a client is complaining or distressed.
23. Helps maintain a calm and safe customer environment, which may include notifying a supervisor or law enforcement in a timely manner.

24. Communicates with others regarding client risk situations.

Physical & Other Requirements:

Activity	Expectation		
Standing	<input type="checkbox"/> Minimal Frequent	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/>
Sitting	<input type="checkbox"/> Minimal Frequent	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/>
Driving vehicles	<input type="checkbox"/> Minimal Frequent	<input type="checkbox"/> Moderate	<input type="checkbox"/>
Lifting and/or Carrying	<input type="checkbox"/> Minimal Frequent	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/>
Bending and/or Stooping	<input type="checkbox"/> Minimal Frequent	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/>
Climbing Stairs and/or Ladders	<input checked="" type="checkbox"/> Minimal Frequent	<input type="checkbox"/> Moderate	<input type="checkbox"/>
Walking or Moving (between offices, other facilities, etc.)	<input type="checkbox"/> Minimal Frequent	<input checked="" type="checkbox"/> Moderate	<input type="checkbox"/>
Other (lift above waist/reaching etc., please explain) Filing charts	<input checked="" type="checkbox"/> Minimal Frequent	<input type="checkbox"/> Moderate	<input type="checkbox"/>

Speaking: ☒ Yes ☐ No
Hearing: ☒ Yes ☐ No
Reading Comprehension: ☒ Yes ☐ No
Repetitive motion with hands, wrists, arms
(e.g. keyboard, typing, handwriting, etc.) ☒ Yes ☐ No

Ability to lift and carry up to **10** pounds.

Ability to handle stressful situations: ☐ Minimal ☐ Moderate ☒ Frequent

	Infrequent	Occasional	Frequent	N/A*
Travel Same Day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Travel Overnight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overtime (Non-Exempt only)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holidays/Weekends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Shift Work (PMs/Midnights)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Copy received by:

_____ **Date** _____

*Expectations regarding quality and quantity of work are further delineated in the criteria-based performance appraisal.