

WAGE & PRODUCTIVITY MINIMUM

- Administrative Professional/SPAR Records
(AD--10-011)

POSITION COMPETENCIES

I. Competency: Manages client visit

(N/A for Program Specialist AD-20)

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.
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 cashier duties including but not limited to making payment arrangements with clients, receipting incoming monies, completing daily deposits, and collecting insurance copayments.
9. Financial Specialist Only: Verifies insurance and requests/processes initial authorizations for new/closed clients. Calls clients to discuss benefits and schedules appointments.
10. Financial Specialist Only: Process TANF paperwork.
11. Financial Specialist Only: Works with all LMC staff to verify active clients that receive new insurance or whose insurance changes.
12. Managed Care Specialist Only: Keeps track of on-going authorizations for commercial insurance including Medicare.
13. Managed Care Specialist Only: Notifies, coordinates, and requests information/documents needed for ongoing authorizations with LMC and external clinicians.

II. Competency: Manages Electronic Records (All)

1. Performs moderately complex typing and clerical work.
2. Updates client data in the Electronic Health Record.

Employee Name:

3. Scans client documents in a timely manner.
4. Files scanned documents in accordance with LMC guidelines “Document Naming Convention” and “Folder List and Content”.
5. Records and processes Release of Information forms in a timely manner.
6. Arranges for good communication by documenting when placing client phone calls and reasons for placing the calls.
7. Performs administrative functions of accurately opening and closing client records per LMC policy.
8. Provides the client with information regarding the Client Portal.

III. Competency: Provides Administrative Support (All)

1. Coordinates coverage with Supervisor and coworkers for clinic schedules.
2. 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.
3. Follows office closing procedures with attention to safety and security.

IV. Competency: Delivers Good Customer Service (All)

1. Greets clients, companions, vendors, and staff in a courteous and timely manner.
2. Practices proper phone etiquette (*is polite, uses friendly greeting, takes responsibility for solving problems, etc.*)
3. Manages phone traffic effectively (*proficient in phone operation- transferring calls, placing calls on hold, etc.*)
4. Assesses for and responds appropriately to client risk situations/events.
5. References client “Warnings” related to safety, and updates as needed.
6. Uses appropriate de-escalation techniques when a client is complaining or distressed.
7. Helps maintain a calm and safe customer environment, which may include notifying a supervisor or law enforcement in a timely manner.
8. Communicates with others regarding client risk situations.

V. Competency: Supports Program Functions

(Only for Program Specialist AD-20)

1. Manages program purchasing and inventory systems.
2. Collects data and generates reports for program.
3. Supports Department Supervisor.

CORE ORGANIZATIONAL VALUES

It is the mission of LMC to provide comprehensive, integrated care that promotes the health and quality of life of our community members.

V. Competency: Supports LMC’s mission, values, and standards

1. Maintain agency and program standards for documentation and EHR

- Complete documentation within LMC guidelines (24 hours of service occurrence).
- Complete documentation in an accurate and intelligible manner.

- Perform client related documentation in accordance with LMC policies and procedures, component specific guidelines, Medicaid and other third party requirements and contract provisions as applicable.

2. Adapt to changing requirements for service delivery

- Respond quickly to changes in work requirements.
- Show flexibility in changing of schedule as needed.
- Be willing to take on additional responsibilities as requested.

3. Demonstrate initiative and self-reliance in the performance of job duties

- Use good judgment in bringing issues to the attention of supervisor without depending on continuous input or deferring decisions.
- Work with cost consciousness.
- Participate in opportunities for program and Center development.
- Organize tasks, manage time well, and direct oneself.

4. Exhibit professional accountability

- Refer to and follow Center Policies & Procedures.
- Perform job tasks in a manner that does not result in audit or monitoring problems.
- Provides appropriate notice for absences and late arrivals, and is not chronically absent or late.
- Accurately reports all hours worked on electronic time sheet by appropriate due date.

5. Maintain and enhance job skills

- Respond to opportunities and requirements for skill development.
- Demonstrate openness to input on work issues from coworkers and supervisor.
- Participate/provide peer consultation/training.

6. Maintain productivity set by program/organization

- Meet service delivery requirements for position.
- Maintain a work-focused atmosphere; share techniques for increasing productivity.
- Perform duties in a manner that expedites the work of other staff.
- Manage time, adhere to deadlines, and prioritize tasks.

7. Comply with LMC safety policies and procedures

- Report potential safety hazards on company property or in business execution.
- Obtain and give consultation in matters related to safety/risk management.
- Use good judgment in matters of safety and liability for which there is no prescribed procedure.
- Complete & submit Incident Reports according to written guidelines and procedures.

8. Exhibit professionalism and ethics

- Observe Center standards for ethical conduct.
- Observe professional standards for ethical conduct.
- Use Center resources for intended purposes.

Employee Name:

- Respect the property and rights of coworkers.
- Submit accurate documentation for work done and reimbursement requested.

9. Protect client and co-worker confidentiality

- Follow established federal, state, and LMC guidelines on confidentiality.
- Access records only where the “need to know” exists.
- Shares information only where the “need to know” exists.
- Conversations are conducted with privacy in mind (phone conversations conducted with discretion, information is not discussed in public areas, etc.).

10. Work effectively with Center staff, clients, and business associates

- Communicate effectively with others using the spoken word.
- Appreciate and be sensitive to the feelings of others.
- Demonstrate tact, courtesy, and helpfulness in relating to community agencies, coworkers, clients, and other associates.
- Coordinate & communicate effectively with others.
- Respond to problems and conflict with solution-focused thinking.
- Work effectively with people regardless of race, color, religion, gender, age, citizenship, marital status, disability, or national origin.

11. Demonstrate sensitivity to persons of varying backgrounds and needs

- Attend to client needs in a thorough and timely manner.
- Speak of and to clients with dignity & respect.
- Be attuned to the presence of trauma indicators and project safety and trust in relating.
- Demonstrate client satisfaction (positive responses to client satisfaction surveys, minimal client requests to change counselor, an absence of warranted complaints, etc.)

PHYSICAL REQUIREMENTS (physical demands of job)

- Must be able to hear conversational speech, visually observe client behaviors for safety and communicate effectively with clients and co-workers
- Vision requirements include close and distance vision

Activity	Expectation			
	Minimal	Moderate	Frequent	None
Standing	Minimal	Moderate	Frequent	None
Sitting	Minimal	Moderate	Frequent	None
Driving vehicles	Minimal	Moderate	Frequent	None
Lifting and/or Carrying	Minimal	Moderate	Frequent	None
Bending and/or Stooping	Minimal	Moderate	Frequent	None
Climbing Stairs and/or Ladders	Minimal	Moderate	Frequent	None
Walking or Moving (between offices, other facilities, etc.)	Minimal	Moderate	Frequent	None
Other (lift above waist/reaching etc., please explain)	Minimal	Moderate	Frequent	None

Employee Name:

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

Ability to lift and carry up to **15** pounds.

Ability to handle stressful situations: Minimal Moderate Frequent

	Infrequent	Occasional	Frequent	N/A*
Travel Same Day	X			
Travel Overnight				X
Overtime (Non-Exempt only)	X			
Holidays/Weekends	X			
Shift Work (PMs/Midnights)	X			

* Not Anticipated

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

POSITION TRAINING REQUIREMENTS

1. Center-wide New Employee Orientation
2. Mandatory annual training
3. Mental Health First Aid
4. Crisis Prevention Intervention
5. List required training here as applicable

TEAM PARTICIPATION (committees/teams in which the employee is expected to participate)

1. List mandatory teams here, if applicable

EMPLOYEE SIGNED ACKNOWLEDGEMENT OF RECEIPT OF JOB DESCRIPTION

My signature below represents that I have read and understand my responsibilities as an Type Job Title and that I am able to perform the essential functions of this position.

Employee Signature	Date
Supervisor Signature	Date

Employee Name: