

INTAKE AND REFERRAL PROGRAM ASSISTANT

JOB TITLE	Intake and Referral Program Assistant
REPORTS TO (title)	Electronic Health Record Administrator
DEPARTMENT/REGION NAME	Statewide
FTE	1.0 FTE/40 hours
FLSA	Non-Exempt
PAY GRADE	11

OFSN strives to create a team of engaged employees who represent diverse backgrounds, languages, points of view and experiences. We understand that achieving equity is a continuous process, and we work to maintain the highest standards of ethics, transparency, and accountability.

OFSN is a family run organization that values those who have direct experience raising a child with significant mental or behavioral health challenges. OFSN gives preference to hiring individuals who have this direct experience.

PRIMARY PURPOSE

The Intake and Referral Program Assistant works to coordinate, prepare, and process family intake information and records in accordance with established guidelines and is responsible for receiving referrals from various referral sources and ensuring they are processed through the intake process in a timely manner.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Data Entry and Scrubbing (60%)

- Amend family data in database that is incorrect, incomplete, improperly formatted or duplicated.
- Monitor and ensure consistent data collection within the electronic health record system.
- Support the creation of electronic health records for families according to established protocols.
- Ensure consistent and complete electronic health records are maintained and meet criteria for billing.
- Review all EHR data for consistency, completeness and data errors.
- Alert appropriate staff regarding activities without status and other system needs.

Referral Coordination (30%)

- Contact new families and complete intake process/paperwork and data entry
- Builds and maintains relationships with key referral partners
- Coordinates communication and EHR documentation for all new families
- Converts a general inquiry to service by managing the process from first call to intake

Data Reporting (10%)

- Generates standardized reports as needed and directed.
- Identify areas of need for new data report development.
- Collect and collate qualitative data through family stories and other narratives.

OTHER DUTIES AND RESPONSIBILITIES

- Participate in organizational workgroups to establish data collection protocols and reporting requirements.
- Collaborates with other data team members to develop best practices for data collection and reporting.
- Support implementation of quality improvement protocols for data and organizational analysis.
- Provide administrative functions for the statewide office as needed.
- Other duties as assigned or needed by the organization.

QUALIFICATIONS

- Ability to communicate effectively with different literacy levels as it relates to technology and data.
- Demonstrated collaborative relationships and facilitation skills.
- Excellent written and verbal communication skills, and ability to present and work with diverse audiences, specifically racial, ethnic, gender expression, socioeconomic, education, spiritual and alternative cultural backgrounds.
- Must be able to pass preemployment requirements, which includes a criminal and abuse background check.
- Must be able to work with multiple projects within tight timelines and deadlines.
- Demonstrate excellent organizational and time management skills.
- Proven ability to work independently and part of a team.
- Have reliable transportation, valid and current automobile insurance and an insurable good driving record, or access to reliable transportation.
- Comprehensive knowledge of, or ability to use, Microsoft Office (such as Word, Excel, PowerPoint, and Access), database, and electronic health record software, and virtual platforms (such as Zoom and Google Meets).

1. PHYSICAL DEMAND - Use the following to indicate the type, amount, and frequency of physical effort typically required to perform the essential functions of the job acceptably; including the work positions in which the effort is applied. Physical effort refers to manual effort and may include lifting, moving, pulling, pushing, carrying, manipulating, shoveling, etc.

A. The physical effort typically applied in this job includes (check all applicable boxes):

- | | | | |
|--|----------------------------------|--|---|
| <input checked="" type="checkbox"/> Lifting | <input type="checkbox"/> Pulling | <input checked="" type="checkbox"/> Reaching | <input type="checkbox"/> Manipulating |
| <input checked="" type="checkbox"/> Carrying | <input type="checkbox"/> Pushing | <input type="checkbox"/> Shoveling | <input checked="" type="checkbox"/> Keying/typing |
| <input type="checkbox"/> Other (specify) | | | |

B. Check the box that best reflects the amount of effort typically applied and the frequency of application (Note: Whereas the following chart refers to lifting, any equivalent effort may be substituted):

Amount of Effort Applied	% of Time Effort is Applied			
	Less than 15%	15% to 40%	40% to 70%	More than 70%
Less than 1lb.				X
Between 1 & 5 lbs.	X			
Between 5 & 25 lbs.	X			
Between 25 & 60 lbs.				
More than 60 lbs.				

C. The effort reflected in the above chart is typically applied in the following work positions (check those applicable):

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Sitting | <input checked="" type="checkbox"/> Standing | <input checked="" type="checkbox"/> Walking |
|---|--|---|

Stooping Bending Confined
 Other (specify)

2. MENTAL OR VISUAL DEMAND - Check the statement below that best describes the degree of mental and/or visual fatigue typically sustained through the application of mind and eyes in performing the job (please edit statement as needed to fit job):

<input type="checkbox"/>	Occasional mental and/or visual attention; the operation performed is either close to being automatic or the duties require attention only at long intervals.
<input type="checkbox"/>	Frequent mental and/or visual attention; the flow of work is intermittent with checking or inspection involved.
<input type="checkbox"/>	Continuous mental and/or visual attention; the work is either repetitive or diversified requiring constant alertness to monitor the production process and/or identify defects.
<input checked="" type="checkbox"/>	Concentrated mental and/or visual attention; the work involves performing complex tasks to very close accuracy and quality specifications; or a high degree of hand and eye coordination for sustained periods.
<input type="checkbox"/>	Intense and/or exacting mental and/or visual attention; the work involves visualizing, planning, laying out, or otherwise performing very involved and complex work.

3. WORKING CONDITIONS - Use the following to indicate the presence, relative amount of, and continuity of exposure to disagreeable elements typically found in the physical work surroundings.

A. Identify the kinds of disagreeable elements incumbent would typically be exposed to in the work area (check all applicable boxes):

Dust Dirt Heat Cold
 Fumes Noise Vibration Water
 Other (specify)

B. Check the statement below that best describes the physical surroundings or conditions under which the job is typically performed and the extent of exposure to the disagreeable elements noted above (please edit statement as needed to fit this particular job):

<input type="checkbox"/>	The job is typically performed under very comfortable working conditions; any disagreeable elements are generally absent during normal performance of job.
<input checked="" type="checkbox"/>	Work is typically performed under reasonably good working conditions; while exposure to any or all the above elements may occur, such exposure is generally not present to the extent of being disagreeable.
<input type="checkbox"/>	The job is often performed under somewhat disagreeable working conditions; exposure to any or all of the above elements is likely, with at least one present to the extent of being disagreeable.
<input type="checkbox"/>	The job is continuously performed under disagreeable working conditions; exposure to any or all of the above elements is probable, with several being present to the extent of being objectionable.
<input type="checkbox"/>	Work is continuously performed under extremely disagreeable working conditions; exposure to many objectionable elements is both continuous and intensive.

4. ATTENDANCE - While all employees are expected to comply with company attendance standards, the nature of some positions may require different standards in order to fulfill the essential functions of the job. Indicate below if compliance with the general company attendance standards is acceptable, or if different standards apply (please be specific):

Compliance with general company standards.
 Must work in partner offices following an assigned schedule that includes both office and community-based work.
 Hybrid 80% in person/20% from home.
 Some weekend and evenings may be required.

May require remote work or virtual work and training delivery.
 Requires regular and reliable attendance.

5. **SAFETY - While all employees are expected to comply with company attendance standards, specific practices as identified through job safety analysis (JSA) may be required. (JSA attached) Indicate below if compliance with the general company safety standards is acceptable, or if different standards apply (please be specific):**

Compliance with general company standards.

Additional safety precautions apply, including communicating status of location, adhering to safety protocols for community-based work and emergency situations.

6. **EEO CLASSIFICATION - This section should be completed by the Human Resources Department. It classifies positions for specific state and federal reporting requirements. Would this be an admin support worker instead?**

<input type="checkbox"/>	Executive/Senior Level Managers (1.1)	<input type="checkbox"/>	First/Mid-Level Managers (1.2)	<input type="checkbox"/>	Professional (2)	<input type="checkbox"/>	Technician (3)
<input type="checkbox"/>	Sales (4)	<input checked="" type="checkbox"/>	Administrative Support Workers (5)	<input type="checkbox"/>	Craft Worker (6)	<input type="checkbox"/>	Operative (7)
<input type="checkbox"/>	Laborer (8)	<input type="checkbox"/>	Service Worker (9)				

7. **SIGNATURES & DATES - NOTE: Because jobs change, management reserves the right to add to or change the duties of the position at any time.**

<i>Immediate Supervisor</i>	<i>Date:</i>	<i>Next Level of Management</i>	<i>Date:</i>
<i>Human Resources</i>	<i>Date:</i>	<i>Employee</i>	<i>Date:</i>