



JOB DESCRIPTION

Access Engagement Specialist

Reporting To: Director, Engagement Services
EEO Category: Administrative Support Workers
Created: 7/13/17

FLSA Classification: Non-Exempt
PRO: Support Positions
Modified: 4/12/18

Position Summary

The Access Engagement Specialist is responsible for creating a responsive, welcoming, and reassuring experience for individuals calling about Aspire services, with a focus on screening, linking and engaging those callers with appropriate Aspire Indiana/Aspire Indiana Health programming, as well as with other needed community services.

Essential Responsibilities

Clerical Office & Customer Service Support (40%)

- Greet and engage callers and welcome them to Aspire Indiana, Inc./Aspire Indiana Health
- Use active listening skills to receive detailed information regarding caller's concerns, and affirm their decision to ask for help
- Provide information to caller about Aspire's services and programs
- Provide exceptional customer services via initial telephonic screening that includes identifying the caller's presenting problem, patient demographics and medical/physical concerns
- Provide an assessment of risk/urgent need that might require a hand off to the crisis department for further clinical assessment
- Arrange initial appointment with the most appropriate service(s)
- Provide information to callers about the process of obtaining access to our services, including what to expect at the initial appointment, providing general information about payment for services, utilizing insurance benefits, and how to obtain assistance from the Entitlement Specialist
- Coordinate and link caller with community resources and other services based upon mutually determined need
- Act as the information broker between community resources and Aspire Indiana, Inc./Aspire Indiana Health
- Maintain a good working knowledge of all programs within Aspire Indiana, Inc./Aspire Indiana Health
- Remain apprised of programmatic and scheduling changes
- Maintain accurate Electronic Medical Records; enter confidential client information into system, including demographics, insurance information, charity assessments, etc.

Coordination and Communication (30%)

- Build and maintain a strong network of external relationships including DCS, behavioral health agencies, health providers, schools and community agencies, etc.
- Build and maintain caring and trusting relationships with clients and family members
- Collaborate and communicate with all parties involved in working towards client's identified goals
- Build and maintain strong working relationships with Aspire staff and supervisors

Reporting & Documentation (20%)

- Maintain case and agency paperwork according to Aspire standards
- Timely complete all required unit and/or organizational reports and/or documentation according to policies and procedures (e.g., PTO requests, expense sheets, trainings requests, TB documentation, etc.)

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for this job. Employees will be required to follow any other job-related instructions and to perform any other job-related responsibilities requested by their supervisor. Duties, responsibilities and activities may change at any time with or without notice.

Professional Development (10%)

- Complete and maintain compliance with required trainings and education required for the position
- Participate in appropriate team and/or administrative meetings, assigned committees, in services, and other continuing education/training
- Proactively create and execute a professional development plan to stay current within field

Competencies

Core Competencies

- **People** - Passionately believes in people and embraces diversity
- **Integrity** - Does the right thing even when no one is looking
- **Laughter** - Believes that laughter is truly the best medicine
- **Learning** - Challenges old paradigms with critical thinking, curiosity and creativity
- **Accountability** - Sets an intentional culture of personal responsibilities; believes everyone carries the load
- **Relationships** - Serves colleagues and consumers with love, empathy and compassion

Position-specific Competencies

- **Helpful** - Serve clients and staff in a friendly, patient and positive manner in acting as a key externally facing representative of the organization
- **Detail-Oriented** - Ensure accurate recordkeeping with meticulous attention to client information and carefully follow billing and reporting protocols
- **Effective communicator** – Use 2-way communication that demonstrates warmth, clarity, and professional consideration for consumer and staff beliefs, values and judgments
- **Conscientious** – Repeatedly produces consistent and polished work from established professional disciplines and guidelines; always works to meet high quality standards
- **Organized** – Promptly assists staff and consumers in an organized, efficient, and steady manner; takes pride in maintaining accurate systems

Critical Functional Skills and Knowledge

Education

- High School Diploma or Equivalent required
- Associate's degree in human services or related field preferred

Experience

- Prior experience in a customer service environment and/or mental health facility or medical office setting highly preferred
- Knowledge of suicide screening a plus
- Must have intermediate computer skills
- Electronic Medical Record (EMR) experience helpful

Other

- Ability to meet or exceed metric standards that have been established for this organizational level or position within Aspire
- Strong ability to maintain strict confidentiality and handle highly confidential information with professionalism
- Must be able to work independently, as well as part of a team
- Must have the ability to quickly create positive and engaging interactions with callers and the ability to ask focused questions to get needed information
- Must have a genuine desire to assist others and creative problem solving skills
- Must possess the ability to learn and/or operate relevant computer operating system environments, and the ability to operate a variety of office equipment (fax machine, copier, scanner, computer, telephone system, postage meter, etc.)

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- Must have strong customer service and interpersonal communication skills and the ability to communicate effectively via phone or in person
- Must have good data entry skills
- Must be detail oriented, have excellent organizational skills and be flexible
- Ability to work well under pressure in a fast-paced, time sensitive environment with shifting priorities and multiple deadlines
- Show appreciation for and ability to respond to cultural differences, and adjusts communication practices accordingly in order to minimize cross-cultural misunderstandings
- Consistent work attendance and compliance with scheduled work hours (excludes approved FMLA absences)
- Responsible for complying with Aspire Indiana's Corporate Compliance Program as it applies to individual job duties, the department, and the company
- Exercise due diligence to prevent, detect, and report unlawful and/or unethical conduct by fellow co-workers, professional affiliates, and/or agents
- Display a positive work ethic

Physical Demands & Working Conditions

The nature of work (physical, mental and visual demands) is consistent with a high activity, general office environment. The physical and working demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Heavy exposure to PC and phones
- Ability to work on a computer for extended periods of time
- Daily, weekly, monthly, and/or annual deadlines
- Ability to communicate effectively by phone or in person
- Specific vision abilities require close vision, distance vision, peripheral vision, depth perception and ability to adjust focus; must also have adequate vision to read correspondence(s), computer screen(s), form(s), etc.
- Physical requirements include ability to sit for prolonged periods, stand, walk, reach, use hands and finger, stoop, kneel, crouch or crawl, climb or balance
- Manual dexterity sufficient to operate keyboard, copier, telephone, calculator, and the ability to write and/or type
- Ability to lift files, open filing cabinets, climb to reach higher files, and occasionally lift and/or move average-weight objects up to 25 lbs.
- Must be able to respond appropriately in crisis situations by following Aspire protocols
- Ability to be flexible and work some early evenings during the Monday - Friday period

Background Checks

Employment is contingent on background checks as required by Aspire's policies which may include: Drug Test, Criminal History, Sex Offender Registry Search, State Central Registry Check, Employment Verification, Education Verification, and/or Professional References

Supervisory Responsibilities

This position has no supervisory responsibilities

Work Hazard Category

Category II - Tasks that involve exposure or potential exposure to blood, body fluids or tissues. Normal work routine involves no exposure to blood, body fluids or tissues, but exposure may be required as a condition of employment as in response to CPR/First Aid incident or in the performance of a response to a behavioral emergency. Appropriate protective equipment is to be readily available to every employee engaged in Category II tasks.

Employee Statement of Understanding

I have read and understand the job description for my position. I am able to perform all of the essential functions of this position. I agree to comply with the corporate compliance policy and all laws, rules, regulations and standards of conduct relating to my position. As an employee, I understand my duty to report any suspected violations of the law or standards of conduct to my immediate supervisor.

As an employee, I will strive to uphold the mission and vision of the organization. All employees are required to adhere to the values in all their interactions with customers and fellow employees.

Employee Signature: _____ Date: _____

Printed Name: _____