

Title: Office Generalist I

Work Unit: Support Team

Reports to: Clinical Manager

Supervisory Responsibility: None

Purpose:

Provides clerical support for the agency including taking phone calls, scheduling appointments, communication with clients, creation and maintenance of charts.

Summary of essential job functions:

Essential functions, as defined under the Americans with Disabilities Act, may include any of the following tasks, knowledge, skills, and other characteristics. The list that follows is not intended as a comprehensive list; it is intended to provide a representative summary of the major duties and responsibilities. Employees may be required to perform additional position-specific tasks.

- Operate office machines, such as photocopiers and scanners, facsimile machines, voice mail systems, and personal computers.
- Answer telephones, direct calls, and take messages.
- Manage calendars and arrange appointments in an electronic scheduling program.
- Greet clients and visitors as they enter the office, review key reminders, and notify appropriate staff of their arrival.
- Copy insurance cards, client IDs, and other materials clients may provide. Collect payment for services.
- Complete the intake onboarding form with potential clients and/or referral sources.
- Complete reminder calls, re-engagement calls, coordination of care and closure surveys
- Manage release of information including responding to request for information and sending out releases of information.
- Communicate with clients, co-workers, and other individuals to answer questions, disseminate or explain information, take orders, and address complaints.
- Open, sort, and route incoming mail, answer correspondence, and prepare outgoing mail.
- Compile, copy, sort, scan, file and electronically manage business and client related documents.
- Conduct client onboarding, registration, and orientation.
- Type, format, proofread, and edit correspondence and other documents, from notes or dictating machines, using computers.
- Review files, records, and other documents to obtain information to respond to requests.
- Demonstrates the ability to pro-actively plan, work, and proceed with a task with limited instruction. Willingly steps up to take on new responsibilities or to help a co-worker complete a task.
- Works collaboratively with fellow employees and others to achieve identified goals and objectives.
- Communicates effectively, both verbally and in writing. Share information and demonstrate ability to listen openly and empathetically to others.
- Contributes to a positive work environment by treating others with fairness and respect.
- Support the relationship between the agency and the community by demonstrating respectful, courteous, and cooperative behavior when interacting with clients, visitor, and other employees.
- Comply with agency policies and procedures
- Demonstrate functional job knowledge as listed on the job description.
- Exhibits adequate skills as listed on the job description.
- Maintains professionalism in compliance with agency standards.
- Will maintain competency with technology related to job functions.
- Contributes to fulfilling the agency's mission and core values by implementing them into daily

practice.

Minimum qualifications/requirements:

- High School Diploma or GED
- Valid Driver's License and Car Insurance

Knowledge:

- Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, and transcription, designing forms, and other office procedures and terminology.
- Knowledge of electronic equipment and computer hardware and software, including common office applications.
- Knowledge of the principles of Health Insurance Portability and Accountability Act of 1996 (HIPAA) Privacy and Security Rules and other Federal and State Laws regarding confidentiality and storage of health information.
- Knowledge of the agency's policies and standard operating procedures.
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

Skills:

- Monitoring/Assessing performance of yourself to make improvements or take corrective action.
- Understanding written sentences and paragraphs in work related documents. Communicating effectively in writing as appropriate for the needs of the audience. Talking to others to convey information effectively.
- Giving full attention to what other people are saying, taking time to understand points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Being aware of others' reactions and understanding why they react as they do.
- Effective management of one's own and other's time; assessing and prioritizing tasks, and working within deadlines to complete tasks.
- Skill in operating a computer utilizing agency software systems, as well as a variety of other business software programs.
- Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
- Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Motivating, developing, and directing people as they work, identifying the best people for the job.
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Working Conditions:

Physical demands:

- Frequent to constant sitting.
- Occasional standing and walking.
- Occasional driving in accordance with job duties assigned.
- Frequent repetitive finger movements for entering data into computer.
- Occasional lifting of less than 50 pounds.

Disclaimer

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. In addition, all personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

Last Updated: 3/14/2019

This job description is not an employment agreement or contract. Management has the exclusive right to alter the scope of work within the framework of this job description at any time without prior notice.

Employee meets essential functions and accepts job responsibilities as outlined in this job description:

Employee Signature	Print Name	Date
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Supervisor has reviewed with employee the job responsibilities as described in this document and has discussed expected standards of performance.

Supervisor	Print Name	Date
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