

FAMILY ELDERCARE
Intake and Referral Specialist
Job Description



Job title: Intake & Referral Specialist	Reports to: Program Manager - Financial Services
Program: Financial & Housing Stability	Work Location: Rutherford Office
Position Status - Full-time FLSA Classification - Non-Exempt	Salary Range - \$23.00-25.00/hour

The Intake & Referral Specialist is the initial point of contact for the agency for individuals interested in services connection. This position will serve as the initial point of contact for potential clients and their advocates. The Intake & Referral Specialist engages directly with the public to perform high-level eligibility screening for Family Eldercare services.

Essential Duties and Responsibilities:

- Conduct phone and walk-in intake screenings for services
- Collect demographic data and financial information to determine basic eligibility
- Field inquiries for services, link and refer to resources as appropriate
- Determine appropriate referrals to internal or community services
- Adhere to minimum data standards in client database including entering new clients into the system, documentation of interactions, screening, etc.
- Assist applicants as needed to gather necessary documentation for internal services and benefits.
- Meets standards for call management as defined by Supervisor.

Other Duties and Responsibilities:

- Assist with administrative tasks for the agency.
- Serve as applicant advocate within Family Eldercare and with outside agencies to assure that clients in need are properly assisted.
- Follow up with referral sources as needed
- Address any procedural, client, or applicant concerns with FEC relevant staff

Education and/or Work Experience Requirements:

- Minimum of high school diploma or GED and some college OR a minimum of Two (2) years' experience working with special needs populations: older adults, persons with disabilities, individuals experiencing homelessness, and veterans.
- Experience with community services, resources, and entitlements
- Proficient in Microsoft Office Software applications and Outlook 365 features
- Reliable transportation and active auto insurance
- Clear multi-state criminal history and motor vehicle driving record
- Required bilingual proficiency (English & Spanish)
- Valid Texas Driver's License

Working Conditions/Physical Requirements:

- Work occurs primarily in an office setting, with some community outreach required
- Ability to safely and successfully perform the essential job functions consistent with the ADA, FMLA and other federal, state and local standards, including meeting qualitative and/or quantitative productivity standards.
- Ability to maintain regular, punctual attendance consistent with the ADA, FMLA and other federal, state and local standards

Competencies:

- Demonstrated knowledge of community-based resources and benefits
- Ability to cultivate and sustain professional relationships and boundaries with clients and coworkers.
- Ability to clearly communicate in person, electronically, and by telephone.
- Ability to effectively respond to callers in crisis.
- Ability to maintain records according to standards.
- Ability to follow quality assurance standards and adhere to contract requirements.
- Ability to work independently with minimum supervision.

Acknowledgement and Review:

By signing this job description, I acknowledge that I meet the qualifications, and am able to perform all job functions, duties, and responsibilities ☐ with or ☐ without reasonable accommodations. I further understand that I am responsible for promptly and effectively communicating in writing to the Company any need for accommodation. I acknowledge that I have read, understand, and may receive a copy of this Job Description. I further understand that Family Eldercare reserves the right to modify any Company policies, procedures, and processes based on organizational needs.

Print Employee Name:

Employee signature:

Date: