



# Redwood Coast Regional Center

Respecting Choice in the Redwood Community

**POSITION TITLE: Intake Specialist**

REPORTS TO: Manager of Intake and Eligibility or Client Services Manager-Early Childhood

## **JOB DESCRIPTION**

Under general supervision, the Intake Specialist shall be responsible for the initial assessment of applicants for services, including interviewing, gathering diagnostic information, and presenting cases to the eligibility team for disposition. The Intake Specialist shall identify the need for additional evaluations and recommend services; and shall complete the various phases of the intake process within set timelines. The Intake Specialist shall also perform related work as assigned.

## **DISTINGUISHING CHARACTERISTICS:**

This classification performs comprehensive, initial assessments of applicants with suspected intellectual and/or developmental disabilities and frequently serves as the first point of contact for the inquirer.

## **QUALIFICATIONS:**

A bachelor's degree from any accredited college or university in social welfare, psychology, public health, special education or other related field and two years relevant experience in a case management position or a master's degree from any accredited college or university in one of the above fields and one year of relevant experience. Bilingual English/Spanish is preferred.

This position requires reliable transportation, possession of a valid California Drivers' License, minimum vehicle insurance as prescribed by law or the ability for independent transportation.

## **DUTIES:**

*Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.*

1. Works directly under the supervision of the Client Services Manager and is involved in all aspects of the intake and assessment process.
2. Answers referral telephone calls, in a timely manner while utilizing the SANDIS program for recording and tracking all referral activity, applicable information; refers ineligible callers to generic agencies.
3. Conducts the initial interview with applicants and families; describes Regional Center eligibility criteria and services; explains the appeals procedures and obtains signatures on pertinent documents such as the Application for services and Releases of Information.



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4. Writes Social Databases incorporating referral information, applicant interviews, and other available documentation; consults with staff, outside agencies and professionals to obtain additional information.
5. Identifies and obtains pertinent information from outside sources; determines additional information required to evaluate eligibility.
6. Presents cases to eligibility team regarding assessment of applicant information; makes recommendations for intervention; arranges for additional diagnostic evaluations or information as requested by eligibility team.
7. Prepares cases for transfer to the Client services unit, which includes completing transfer summaries, releases of information and other related records.
8. May participate in special assignments, programs or projects, and serve on committees as requested.
9. Participates in community outreach efforts for the agency.

## **SKILLS:**

Extensive knowledge of principles, objectives and techniques of counseling individuals, especially that of grief counseling; human growth and development, and dynamics of family relationships; knowledge of available resources which can be utilized by the applicant; ability to identify and utilize generic service organizations; ability to interview skillfully, and interpret the information; ability to work independently and exercise judgment in making decisions; ability to be well organized and work within mandated timelines; ability to work as part of an interdisciplinary team; ability to stimulate the cooperation of clients, their families, and community agencies; ability to maintain case records in a clear and concise manner.

Extensive knowledge of the Regional Center system, the California Early Intervention Services Act (for Early Childhood Intake Specialist) and the Lanterman Developmental Disabilities Services Act; knowledge of developmental disabilities, case management and assessment functions; ability to work with community agencies; possession of excellent interpersonal communication skills both verbally and in writing.

## **TRAVEL REQUIREMENTS:**

This position requires extensive travel within the catchment area which occasionally could require overnight trips throughout the four counties served by RCRC and California. This position requires a reliable form of transportation, possession of a valid driver's license, minimum vehicle insurance as prescribed by law, or the ability for independent transportation.

## **PHYSICAL AND MENTAL REQUIREMENTS**

Extensive sitting in office settings, for meetings and for travel. Frequent walking and standing, and occasional lifting of up to 15 pounds with occasional bending, stooping, reaching and



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stretching to complete work duties. Adequate manual dexterity and coordination for operation of automobile, computer and other standard office equipment Any of the above with reasonable accommodation.

This position requires the ability to work under pressure of deadlines and a fast-paced environment, and, at times, to cope with complex and potentially stressful situations.

## **OTHER DUTIES:**

Provide Voter Registration application and to all Regional Center applicants of voting age in accordance with the Voter Registration Act of 1993 (for Over 3 Intake Specialists).

Participates in speaking, and public information activities in the community and within the RCRC agency orientations.



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## Intake Specialist Core Competencies

### 1. Knowledge of Developmental Disabilities

- Knowledge of the etiology and characteristics of developmental disabilities.
- Knowledge of eligibility criteria as defined in the Lanterman Act and Title 17 Regulations, including:
  - Definition of each diagnosis,
  - Definition of each area of the seven domains of major life activity,
  - Definition of the term “Substantial Disability”, and
  - Understanding of how different developmental disabilities manifest themselves at different ages.
- Ability to accurately screen referrals for intake processing, sharing with the referral source information on community and generic resources that may be of benefit if intake eligibility guidelines are not met, including rights of due process.
- Knowledge of ASD and accurately assess the potential of ASD and/or developmental delays in Early Childhood
- Ability to calculate % of delay, knowledge of Early Childhood milestones and how to support delay in developmental areas.
- Knowledge of services such as OT, PT, SLP, and OM.

### 2. Communication Skills

- Communicates clearly and accurately both verbally and in writing.
- Demonstrates good knowledge of alternative, age appropriate and person-centered communication strategies when interacting with individuals with a potential developmental or intellectual disability, whether communication in person, on the phone, or via written communication.
- Ability to effectively communicate with a variety of people (e.g., families, clients, community professionals) in a jargon-free and culturally sensitive manner.
- Exhibits active listening skills when receiving input on other’s ideas and/or concerns.
- Clearly communicates information to team members, providers and others in regard to actions necessary to provide best service to clients and meet Agency, state and federal mandates and/or policies/procedures.
- Provides timely updates and the sharing of information and decisions to client’s team members in a manner that empowers the team members with knowledge, positive outcomes, and clarity on any required actions by the team member(s).



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## 3. Interviewing and assessment skills

- Extensive knowledge of various interviewing strategies, with the ability to effectively utilize respectful and responsive interview techniques based upon the environment and individual situation, including sensitivity and understanding of cultural differences related to conducting interviews.
- Clear understanding of the five stages of grief and the ability to empathize, while maintaining professional boundaries, with the applicant and/or his/her family during their individual grief process.
- Ability to gather, synthesize and interpret information from a variety of sources, including medical reports, developmental screenings, Individual Education Plans (IEPs), etc.
- Ability to engage client/ family and other natural supports as active participants in the assessment process, psychological testing and firsthand observation.
- Ability to accurately assess the applicant's strength and substantial disability in all the various domains of living as it relates to the person's clinical diagnoses, including how any social/environmental factors, learning disabilities, chemical health or mental health disorders may be affecting applicant's level of functioning.
- Notices discrepancies and inconsistencies in available information, asking clear and succinct questions to obtain clarity and thoroughly assess situation.
- Clear understanding of the differences between the multidisciplinary team process for eligibility determination and the process of assessment for service planning used for the development, implementation, and evaluation of the IFSP or IPP.
- Ability to maintain the highest degree of confidentiality.

## 4. Documentation

- Ability to multitask, managing multiple cases, and timelines simultaneously.
- Ability to produce and present verbal and written reports that are detailed, factual, concise and easily understood by families, service providers, case management team members and clinicians.
- Maintains both thorough and timely referral/applicant/client information within the Agency's database system (SANDIS), including but not limited to inquiry data base, T-19 case notes, client master file documentation, and purchase of service authorizations.



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## 5. Teamwork

- Promotes and demonstrates RCRC's Mission and Vision.
- Represents the Redwood Coast Regional Center in a professional and positive manner.
- Actively participates as a professional member on the Agency's eligibility team; providing critical input as to applicant's eligibility for regional center services per California's state laws and regulation.
- Ability to work collaboratively with other members of the eligibility team, families and other professionals in the community.
- Ability to function autonomously when needed within parameters of job, utilize prudent, professional judgment, and seek assistance when needed by consulting with supervisor or other management and/or clinical department staff.
- Maintain positive working relationship with one's supervisor through regular consultation sessions and by keeping him/her apprised of any client and/or family situation for which there is elevated concern.
- Participates in fair hearings as requested by the Agency's appointed fair hearing representative.

## 6. Adaptability/Dependability

- Ability to maintain professional boundaries and demeanor even under pressure and during difficult situations.
- Demonstrates openness to new organizational structures, procedures, and technology.
- Independently prioritizes work responsibilities to meet client and Agency needs, along with expected outcomes and deadlines.
- Takes personal responsibility for one's own job performance and demonstrates a commitment to professional growth and development through ongoing participation in training and literature review.

## 7. Proactive

- Engages in difficult situations in a calm and positive outcome-focused manner.
- Demonstrates professional ethics in all aspects of work including, but not limited to, confidentiality, honesty, respectful demeanor, and accountability for one's actions.
- Demonstrates the ability to identify when additional information is needed to clarify a situation or to make a decision and seeks to obtain clarity from the appropriate person or entity.



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## 8. Computer/Technical Skills

- Excellent phone skills including ability to return phone calls generally within 48 hours.
- Displays proficiency using standard office equipment such as a computer, fax, photocopier, scanner etc.
- Demonstrates a solid working knowledge of the computer programs and information systems required for the completion of one's work responsibilities including, but not limited to SANDIS, ADP, Microsoft Outlook, and Microsoft Word.