



Redwood Coast Regional Center

Respecting Choice in the Redwood Community

Client Services-Unit Assistant

- I. **Job Summary:** Under minimal supervision, the Unit Assistant performs highly skilled administrative, supportive functions and secretarial duties for staff, and is an active member of the unit or units; performs job functions with a high degree of independence and initiative.

- II. **Functions and Responsibilities:** Responsible for complex and specialized tasks such as the maintenance of computer related information, composing and maintaining reports and surveys and composing correspondence from both verbal and written direction; researches, gathers, analyzes and reports statistical information; provides assistance in the absence of other unit members; completes forms and applications; establishes tracking systems and filing systems; completes tasks related to state and federal requirements; requests and tracks client data base information; obtains signatures on forms as needed; sends informational packets; coordinates and schedules meetings both on-site and off-site; responsible for responding to requests for information relating to agency's services, policies and procedures; and other duties as assigned.

- III. **Minimum Employment Standards:**
 - A. *Education:* Graduation from high school or G.E.D.

 - B. *Experience:* Four years experience in office work, preferably in a Social, Medical, or Human Services environment, with a demonstrated increase in responsibilities is required or an AA degree in general business or Human Services related field may be substituted for one year of office experience. A BA degree in general business or Human Services related field may be substituted for two years of office experience.

 - C. *Knowledge, Skills and Abilities:*

The ability to work with minimal supervision and to exercise independent judgement and initiative; ability to work as a member of a team; ability to receive and communicate information clearly by phone and in person; skill in prioritizing and organizing work to meet multiple demands and deadlines, skill in remaining flexible to changing schedules, skill in maintaining the confidentiality of Clients and organizational data; skill in relating to the general public and staff members in a tactful, concise and diplomatic manner; the ability to type 55 wpm as shown by a typing certificate; knowledge of operating a variety of office machines, including personal computers, copies, fax machines and calculators; knowledge of the English language including excellent spelling, grammar and punctuation; knowledge and extensive experience working in a Microsoft/Windows environment including Word, Excel, Access; knowledge of SANDIS.

 - D. *Other Requirements:*

Local and regional travel, including overnight trips, will be required. This position is a non-exempt full time position. This position requires extensive sitting in office settings, for meetings and for travel. Additional physical requirements are: frequent walking, standing



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and occasional lifting up to 40 pounds with occasional bending, stooping, reaching and stretching to complete work duties. Any of the above with reasonable accommodation.

E. *Supervision:* This position is supervised by a Client Services Manager.

UNIT ASSISTANT Client Services Job Duties

- Preparing and distributing a variety of correspondence, reports and forms.
- Input data into SANDIS database.
- Assists with scheduling meetings and appointments.
- Maintains files and records.
- Track and log information.
- Complete complex filing for all staff members.
- Prepare letters to request Medical Records for Service Coordinators
- Coordinates meetings.
- Prepare and distribute meeting minutes.
- Assemble detailed information packets as requested.
- Detailed and complex copy projects.
- Extensive database entry and information retrieval.
- Create flyers, forms, mailing labels and packets.
- Manage bus ticket distribution.
- Assure Master Calendar is current.
- Proof-reading documents for accuracy.
- Maintain and manage file storage area.
- Maintain master file of agency forms and documents. Update when necessary.
- Organize all specialty clinics including coordinating dates, scheduling clients, preparing documents, preparing room, reminder calls to clients and families. Relaying information to Service Coordinators.
- Assist clients to complete necessary forms at direction of staff.
- Provide resource information to clients.
- Assist Service Coordinators in arranging transportation and out of area lodging for clients.
- Processes and distributes mail within unit.
- General office support when necessary, including: management and maintenance of office machines, video conference set up, faxing documents, preparing letters as requested.
- Back-up Reception duties – professionally greeting visitors and directing phone calls.