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. Redwood Coast Regional Center's Workplace Security Policy:
Employee security responsibilities:
- Access only the systems, data, and physical spaces required for your position.
- Keep credentials confidential, never share or reuse them and use multi-factor authentication (MFA) where implemented.

- Immediately report suspected credential compromise, security incidents or any suspicious activity, or potential risk, to the ITG Team and/or your supervisor.
- Complete all required security and data protection trainings on time.
- If working out of the office such as in the field, use secure connections and compliant, protected devices; do not access or store confidential information on unsecured networks or personal devices without authorization
- Return all organizational assets upon termination of employment or at the end of your contract and cooperate with HR/IT to promptly remove system access.
- Understand that violations of security policies and procedures may result in disciplinary action, including termination of employment and/or legal action.

E. *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 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.

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

UNIT ASSISTANT
Client Services Job 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.

- 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.

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Core Competencies for
Unit Assistant for Client Services

1. Client Service
   - Interacts professionally with clients, families, agencies, service providers and associates at all times.
   - Understands and "demonstrates" RCRC Mission and Vision.
   - Employs person centered thinking principles in interactions with clients, staff and service providers.

2. Adaptability
   - Demonstrates flexibility in the face of change.
   - Projects a positive demeanor regardless of changes in working conditions.
   - Shows the ability to manage multiple conflicting priorities without loss of composure.
   - Able to adapt to change in processes, data management systems and learn and utilize new process and programs for multiple tasks.
   - Takes personal responsibility for one's own job performance and demonstrates a commitment to professional growth and development through on-going training.

3. Communication Skill
   - Communicates clearly and accurately both verbally and in writing to project a positive image of the business.
   - Speaks with confidence using clear, concise sentences and is easily understood, and is diplomatic in all communication.
   - Ability to document and communicate information in a factual, accurate, concise and timely manner.
   - Exhibits active listening skills when receiving input on other's ideas and/or concerns.

4. Team Player
   - Works as a competent member of the team, willingly providing back-up support for co-workers when appropriate and actively supporting group goals.
   - Willingly assists other departments as appropriate.
   - Ability to function autonomously when needed within parameters of job and assigned tasks and utilize prudent, professional judgement and seek assistance when needed by consulting with supervisor.
   - Represents the Redwood Coast Regional Center in a professional and positive manner.
   - Maintains working relationship with one's supervisor through regular consultation sessions.
   - Promotes cooperation with other work units, Agency departments and allied agencies.

5. Judgment
   - Exhibits sound judgment and the ability to make reasonable decisions in the absence of direction and are consistent with person centered principles and the Agency's mission and vision.
   - Demonstrates the ability to swiftly refer problems/issues to the appropriate person, and identify when additional information is needed to clarify a situation or to make a decision.
   - Works effectively without constant and direct supervision or guidance.

- Demonstrates professional ethics in all aspects of work including confidentiality, honesty, integrity, respectfulness, and accountability for one's actions.
- Works in tandem with the Manager of the Unit.

6. Proactive
   - Demonstrates the ability to foresee problems and prevent them by taking action.
   - Utilizes analytical skills and a broad understanding of the business to effectively interpret and anticipate needs.
   - Approaches challenging tasks with a "can-do" attitude.

7. Organization
   - Ability to balance conflicting priorities in order to manage workflow and management of time to ensure the completion of essential projects, and meet critical deadlines.
   - Effectively manages the workspace (i.e. keeps a clean and organized office, appropriately handles all paperwork, maintains control over the physical environment).

8. Computer/Technical Skills
   - Responds to phone calls and emails in a professional and timely manner.
   - Displays proficiency using standard office equipment such as a computer, fax, photocopier, scanner.
   - 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, Microsoft Word and Abode Pro.
   - Demonstrates advanced proficiency by quickly adapting to new technology and easily acquiring new technical skills.
   - Able to create tracking systems, utilize Excel spreadsheets for monthly, quarterly, yearly statistics.
   - Able to produce flyers and other training material (power point, etc.) under supervision of the Manager.

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