

## Wesley House Family Services

### Position Description

**Position Title:** Referral and Tracking Specialist

**Department:** CBC

**Purpose:** The Referral and Tracking Specialist will be responsible for completing and tracking service referrals for Full Case Management Clients, as well as tracking linkage to needed services and obtaining regular reports from service providers.

**Reports To:** Service Coordinator Supervisor

**Classification:** 1.0 FTE, Non-Exempt

#### Responsibilities:

- Responsible for attending Full Case Management staffings including but not limited to Case Transfer, CBHA, Case Plan and Permanency staffings to ensure early identification of needed services.
- Responsible for completing and submitting referrals for needed services for both children and adults within three (3) business days of the need being identified.
- Responsible for documenting completed referrals in FSFN.
- Responsible for following up with service providers and ensuring linkage to needed services within thirty (30) days.
- Responsible for documenting linkage to services in FSFN.
- Responsible for requesting and obtaining ongoing reports from service providers and uploading reports to FSFN.
- Responsible for maintaining ongoing records of referral dates and linkage dates to provide quality assurance data.
- Responsible for reporting progress and barriers with service provision internally to Wesley House management staff and externally to community partners as needed.
- Responsible for providing monthly reports regarding referrals made, timeliness of linkage.
- Responsible for completion of Flex Fund documentation when needed for payment of service provision.
- Responsible for attending meetings with services providers as needed to ensure ongoing communication and cooperation.
- Responsible for providing assistance for the Quality Assurance and Full Case Management departments to ensure smooth operation of agency functions as needed.
- Responsible for completing fingerprints on relatives and non-relatives as requested by FCM.
- Responsible for completing diligent search requests as requested by FCM.
- Responsible for assisting with supervised visits as needed.
- Responsible for facilitating QPI icebreaker meetings and completing required paperwork.
- Responsible for covering front desk as needed while receptionist is on lunch or unavailable.
- Responsible for assisting with Medicaid issues and identifying solutions to ensure services are covered by insurance.
- Assist with all risk management activities of the organization including identifying potential risk/liability situations.
- Other related duties as required ensuring the smooth running and efficiency of the Wesley House Family Services Full Case Management program.
- Comply with Wesley House Personnel and Finance policies, Ethical Standards and Wesley House Confidentiality requirements

- Perform all activities, job duties and responsibilities and functions in an accurate and efficient manner with respect and appreciation for the culture, traditions, languages, and practices of the persons served.
- Follow the guidelines regarding the reporting of unethical actions or practices as outlined in the Wesley House Family Services Personnel Manual
- No documented instances of a breach of duties with established principles, standards, contractual and legal requirements
- Wesley House Family Services assets are safeguarded and used according to agency policies and procedures.
- Responsible for accurately completing individual timesheet by no later than the Monday before payroll is completed.
- Perform other duties as assigned.

#### Performance Measurements:

- Responsible for attending Full Case Management staffings including but not limited to Case Transfer, CBHA, Case Plan and Permanency staffings to ensure early identification of needed services.
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- Responsible for documenting completed referrals in FSFN.
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- Responsible for reporting progress and barriers with service provision internally to Wesley House management staff and externally to community partners as needed.
- Responsible for providing monthly reports regarding referrals made, timeliness of linkage.
- Responsible for completion of Flex Fund documentation when needed for payment of service provision.
- Responsible for attending meetings with services providers as needed to ensure ongoing communication and cooperation.
- Responsible for completing CBHA linkage report as requested by Citrus.
- Responsible for completing fingerprints on relatives and non-relatives as requested by FCM. This includes completing PO requests for payment.
- Responsible for completing diligent search requests as requested by FCM. This includes FSFN documentation and sending the affidavit to CLS.
- Responsible for assisting with supervised visits as needed.
- Responsible for facilitating QPI icebreaker meetings and completing required paperwork. This includes uploading required documents into FSFN.
- Responsible for covering front desk as needed while receptionist is on lunch or unavailable (PTO, sick or if position is vacant).
- Responsible for assisting with Medicaid issues and identifying solutions to ensure services are covered by insurance.
- Responsible for providing assistance for the Quality Assurance and Full Case Management departments to ensure smooth operation of agency functions as needed.

**Qualifications:**

- High School diploma (or equivalent) required, Associates degree preferred, minimum two year's relevant experience.
- Ability to Develop and Manage complex tracking systems.
- Ability to maintain professional working relationships internally and with external stakeholders and partners.
- Ability to analyze data and take the initiative to develop strategies for improvement and increase efficiencies.
- Ability to work independently, strong organizational skills/multitasking and ability to consistently meet deadlines.
- Excellent written and verbal communication skills.
- Strong computer skills in a Windows environment, Microsoft Office, Excel, Word. Emphasis on proficiency with Excel.

### Intent and Functions of Position Description

Job descriptions assist Wesley House Family Services in ensuring that the hiring process is fairly administrated and that qualified employees are selected. They are also essential to an effective performance appraisal system and related promotion, transfer, layoff, and termination processes.

All job descriptions have been reviewed to ensure that only essential functions have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills and abilities included have been determined are the minimal standards to successfully perform the required functions. In no instance, however, should the duties, responsibilities and requirements delineated be interpreted as all-inclusive. Supervisors may assign additional functions and requirements as deemed appropriate.

In accordance with the American with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled persons. However, no accommodations will be made which may pose serious health or safety risks to the employee, other employees, persons served or which impose undue hardships on Wesley House Family Services.

Job descriptions are not intended as and do not create employment contracts. Wesley House Family Services maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law and at any time.

I have received and reviewed this Position Description on \_\_\_\_\_, \_\_\_\_\_, 20\_\_\_\_\_.  
(Month) (Day) (Year)

\_\_\_\_\_  
Referral & Tracking Specialist (Signature)

\_\_\_\_\_  
Service Coordinator Supervisor (Signature)

\_\_\_\_\_  
Referral & Tracking Specialist (Print)

\_\_\_\_\_  
Service Coordinator Supervisor (Print)