

**COUNSELING ALLIANCE PLLC
JOB DESCRIPTION**

I. IDENTIFYING INFORMATION

Position Title: Administrative Specialist
Status: Part time (approx. 30 hours/week), Non-exempt, 12 months
Reports to: Business Manager

II. PRIMARY FUNCTIONS OF THIS POSITION:

Performs a variety of tasks related to: 1) general office and intake duties of the Counseling Alliance front office, 2) the overall efficient operation of the front office, 3) assists with marketing to, and networking with, outside organizations/entities, and 4) assists with coordination of special events.

III. MAJOR POSITION RESPONSIBILITIES AND REGULAR ACTIVITIES:

GENERAL OFFICE DUTIES

Performs all normal secretarial/receptionist functions including, but not limited to: answering phones, filing, and typing assistance to Owners and counselors
Operates office equipment and arranges for maintenance and repair
Directs all business calls to Business Manager
May purchase food and beverages or other supplies for meetings, workshops or other activities as directed by Owners and Business Manager
Purchases office, kitchen and janitorial supplies
Purchases books, test kits, and other educational materials for sale to clients
Maintains inventory of supplies, forms and educational materials
Daily restocking of all bathroom and kitchen supplies, general tidying of waiting room and front bathrooms
Reports any janitorial or maintenance issues to Owners or Business Manager
Maintains good communication with entire staff through group email (Outlook)
Schedules staff meetings, prepares agendas and takes minutes
Performs other duties as appropriate to position and as directed by Owners and Business Manager

CLIENT RELATED DUTIES

Greets clients in a friendly and inviting manner
Initiates intake for new clients, including intake forms, set up in Therapy Notes and QuickBooks
Schedules clients through Therapy Notes
Tracks new client assignments (how referred, counselor selection, etc.) for Owners' review
Processes payments through QuickBooks and reconciles daily

CLIENT RELATED DUTIES (continued)

Works with Business Manager to process NSF checks, failed credit card transactions, overdue balances, refunds, write-offs, etc.
Produces invoices upon request to clients or 3rd party payers
Responsible for collection of past due accounts
Interfaces with counselors regarding crisis calls
Alerts counselors to last minute calendar changes

Maintains excellent client satisfaction and quickly resolves complaints or concerns
Interfaces with 3rd party payers including, but not limited to, medical savings accounts (HSAs, FSAs), churches who assist clients, EAPs, Opportunities for Ohioans with Disabilities, etc.

Maintains knowledge of CPT coding requirements

Maintains individual/group credentialing for EAPs, out-of-network providers, with attention to specific criteria for counselor eligibility

Files payment assistance requests/paperwork from 3rd party payers per their requirements

Prepares Cost Information Worksheet for Jumpstarts, IOPs, workshops or other groups quickly for final processing by Business Manager

Assists in coordination of special events

MARKETING, COMMUNITY OUTREACH AND LIASION

Creates and maintains community databases including current church database

Assists in the creation of marketing materials as needed for workshops, IOPs, groups, etc.

Assists in distribution of materials through electronic means and traditional mail

Promotes Jumpstarts, groups, workshops, etc. when talking with clients

IV. POSITION SPECIFICATIONS/REQUIREMENTS

SKILLS, KNOWLEDGE AND/OR ABILITIES (SKAs)

Ability to maintain strict confidentiality

Detail oriented with high degree of organizational skills

Excellent written and verbal communication skills (clients and inter-office)

Must be flexible and able to multi-task

Must present self in a professional manner

Team oriented with excellent interpersonal skills

EDUCATION, TRAINING AND/OR EXPERIENCE

College degree preferred

3-5 years experience in general office and business procedures

Proficiency in all Microsoft Office platforms (esp. Word, Excel, Outlook and Publisher)

QuickBooks experience a plus

Medical/Counseling office experience a plus

Some knowledge of bookkeeping a plus

V. RESPONSIBILITY FOR QUANTIFIABLE MEASURES

Purchasing budget to be established by Business Manager

VI. WORKING ENVIRONMENT

Normal office environment