



**Title:** **WorkLife Telephone Consultant**

**Reports To:** Director, WorkLife

**Qualifications:** The **Adult/Elder Telephone Consultant** must:

- Be a geriatric specialist with a bachelor's degree in a human service field, plus two (2) years' supervised experience in providing service to older adults and their families.
- Must be adept at the use of community, printed and on-line resources available to the client, including the use of database resources.

The **Child and Family Telephone Consultant** must:

- Be a specialist in child and family service
- Bachelor's degree in a human service field, plus two (2) years' supervised experience providing service to children and families.

The **NurseLine Telephone Consultant** must:

- Be a Registered Nurse specialist
- Have two (2) years supervised experience in providing home health service to older adults and their families.

**Preferred Experience:**

- ♦ Prefer advanced certifications such as Certification in Gerontology.
- ♦ Must be clinically current with evidence of ongoing professional education and training.
- ♦ Must be able to communicate effectively in both verbal and written form.
- ♦ Must demonstrate excellent telephone assessment and communication skills
- ♦ Must demonstrate proficiency with use of computer programs including Microsoft Word, Microsoft Access (use of database) and use of Internet resources.

**Job Scope:**

The telephone consultant encourages the client to utilize the multiple services available to them through Sound Options, Inc., and in the community. Telephone consultants may function in all three WorkLife service areas or be assigned to one of the three specific areas depending on business needs.

**Adult/Elder Consultant**

The Adult/Elder telephone consultant provides comprehensive assessment, confers with the caller to determine their needs and the perceived needs of the older adult, provides information and resources to the caller and/or older adult, refers the caller and/or the older adult to community and ongoing Sound Options, Inc. care management as indicated, and follows up with the client to ensure that their needs have been met.



### ***Child and Family Consultants***

The Child and Family telephone consultant provides comprehensive assessment, confers with the caller to determine their child care or child development needs, provides information and resources to the caller, refers the caller to community resources as indicated, and follows up with the client to ensure that their needs have been met.

### ***NurseLine Consultants***

The NurseLine telephone consultant refers emergency calls to 911, performs a brief assessment of the caller's needs, provides nursing information and education, answers questions when possible and appropriate, refers callers to emergency rooms, health care providers, or other community resources as indicated, and follows up with the client to ensure that their needs have been met. Provides healthcare education.

*Principal duties and responsibilities include, but are not limited to, the following:*

## **1. Duties and Responsibilities**

- Maintain office hours and be available to take incoming service requests during specified hours of service.
- Maintain a productivity and customer service expectations on all transactions.
  - Maintain an average productivity rate of 5 cases per day (1.5 hour average per case).
  - Provide comprehensive assessment of the needs of the client and/or family.
  - Provide education to client and/or family members as described under "Client Service"
  - Develop a plan with the client and/or family for locating resources and materials to address their immediate situation.
    - Assist the client and/or family in defining their needs
    - Locate resources as indicated by the client's needs, and make them available to the client via e-mail, FAX or US Mail per the client's request
    - Assist the client and/or family in accessing materials, services and products.
  - Adhere to Sound Options, Inc. WorkLife Policies and Procedures, including timeliness and completion of reports, letters and documentation.
  - Maintain client confidentiality and professional ethical standards.

## **2. Service Delivery**

Telephone consultants will initiate service delivery by assessing the client and developing an individualized plan with the client and/or family, incorporating their goals.

- Conduct thorough telephone assessments with callers as outlined in Sound Options Inc. WorkLife policies and procedures.



- Follow Sound Options Inc. policies and procedures for gathering specific information to aid in the delivery of appropriate and timely client specific resources.
- Facilitate a thorough and custom tailored discussion regarding the issues presented, possible resources, timelines for additional follow up assessments and the implementation plan.
- The consultant will use all available resources to locate the services, information or products that the caller is seeking, including:
  - o Sound Options' resource database.
  - o Sound Options resource files.
  - o Sound Options' designated websites.
  - o Sound Options' articles and other printed materials.
- Service will continue to be provided until the client's needs have been met satisfactorily.
- Draft and send customized response and follow up letters as outlined in Sound Options Inc.'s policies and procedures.
- Send materials packets to clients as requested or appropriate including but not limited to:
  - o The Sound Options, Inc. Statement of Responsibilities
  - o Client Feedback Form (self-addressed and postage paid)
  - o Materials specific to the client's particular area of interest or need
  - o If the materials include any web site links or references to websites, the disclaimer located in F:Clients/WorkLife/Web Links Disclaimers for the employer or EAP must be included with the letter.
  - o If the case is a test case, the letter and packet will be routed to the WorkLife Manager for review prior to mailing.

### 3. Follow-Up

- Approximately one week, but not more than two weeks, after the packet has been mailed to the client, the consultant will telephone the client to ensure that the packet was received and that the client's needs were met.
- If the client's needs were satisfied and no further assistance is required, the consultant will close the case in the database following the instructions in the WorkLife Database User Guide, per policy and procedures.
- If the client requires further assistance or information, the consultant will proceed with the research, preparation of materials, and client follow-up as designated above.
- All necessary forms, including referral forms as required by EAP's or other WorkLife partners, Activity Logs and time sheets will be completed and routed to the Financial Assistant to ensure that invoicing can be completed in a timely manner.

### 4. Technology

Demonstrate proficiency with the following:

MS Word	MS Outlook	MS Access – User applications
Internet	Data Entry	Typing speed / accuracy

### 5. Productivity

- Meet minimum FTE requirement of 5 cases per day (or equivalent).
- Billable Hours Reporting:



- o Track billable hours using on time, accurate and legible Activity Logs, other paper or electronic reporting systems such as the Sound Options database.

## 6. Communication

*Consistently demonstrate proficiency and professionalism in the following:*

### **Interpersonal Skills**

- Effective listening skills: seeks to understand what is being communicated from the other's point of view
- Effective telephone skills: checks messages frequently, returns phone calls and makes promised telephone calls, uses professional telephone manners
- Customer service orientation: places the interests of the clients first and strives for customer satisfaction
- Maintain positive client relationships.
- Receive positive client feedback survey results and comments.
- Maintain positive, professional office relationships:
  - Notify on-call nurse of relevant client situations, advise reception staff of daily schedule, and inform client regarding contact information.
  - Demonstrate responsibility for personal work habits and self-care including but not limited to:
    - Managing workload to maintain effectiveness.
    - Request help when needed.
    - Clarifying and seeking information when needed.
    - Taking initiative to make sure that things get done.
    - Contributing new ideas for efficiency and improved systems.
    - Participating on committees, staff meetings and care conference.
    - Assist in developing new resource contacts.

### **Written and Verbal Communication Skills**

- Professional correspondence: clear communication of resources presented including accurate spelling, grammar, and syntax in all correspondence.
- Excellent verbal communication and congruent body language: seek to be understood by the listener, speak clearly, and refrain from the use of jargon, check in with the listener for understanding.
- High level of listening acuity required. Demonstrated ability to listen for nonverbal cues, the ability to match speech patterns and quickly establish and maintain rapport during telephone conversations.

## 7. Professionalism

- Professional demeanor: adhere to all performance standards in Sound Options' Employee Handbook including but not limited to professional grooming and dress, professionalism in client interactions, and client relationships.
- Confidentiality and Professional Standards: Maintain client confidentiality and professional standards as established by the National Association of Geriatric Care Managers and the American Nurses Association
- Prepare reports and documentation following standards dictated by Sound Options Policies and Procedures and the WorkLife Manual.
- Build professional relationships in the community representing Sound Options.



- Report awareness of community events or situations that may affect Sound Options business activities.
- 8. Corporate**
- Support and collaborate with WorkLife manager and WorkLife team to promote services.
  - Attend monthly WorkLife team meetings, and all ad hoc departmental and organizational meetings.
  - Participate in short-term and long-term strategic planning.
  - Participate on committees and task forces as needed.
  - Assist with marketing efforts. Attend and participate in industry trade shows, meetings, and employer benefit fairs.
  - Maintain positive, long-term, professional relationships with sponsor clients.
  - Actively support all Sound Options, Inc. colleagues in a positive and professional manner.
  - Ensure confidentiality as outlined in the Sound Options Inc. Employee Handbook and all supporting policies and procedures.
- 9. Working Conditions:**
- Work is performed in a professional business office environment, well lighted, clean, and hazard-free.
  - Office equipment is kept in good operating condition to enable work to be done efficiently.
  - Work with clients may require travel within Western Washington and outside the area.