

**INFORMATION AND ASSISTANCE SPECIALIST**  
**AGING AND DISABILITY RESOURCE CENTER OF COLUMBIA COUNTY**

**POSITION DESCRIPTION**

**I. Position Summary**

This position is a skilled, full-time Information & Assistance Specialist position, in the Health and Human Services Department under the general supervision of the Aging and Disability Resource Center Director/Assistant Director.

**II. General Duties**

The Information and Assistance (I&A) Specialist position works as a first point of contact to assist all customers, particularly adults aged 60 and older and adults living with physical or developmental/intellectual disabilities to identify needs, determine benefit eligibility through assessment, enrollment and disenrollment services for long-term care, and links individuals with services/resources they may need to live in the community with dignity, respect, and purpose. The I&A Specialist provides unbiased, accurate, and friendly customer service responses to requests for information about options and assists customers to connect with resources both private and publicly funded. The I&A Specialist helps to empower customers to make informed choices and to streamline access to appropriate supports and services. The I&A Specialist raises community awareness of the Aging and Disability Resource Center through outreach activities and developing community partnerships.

**III. Essential Duties and Responsibilities**

1. Fulfill a customer service role, ensuring that the individual experiences a welcoming atmosphere and consumer satisfaction is achieved.
2. Perform home visits at a time and place that best meets the individual's schedule primarily within standard business hours.
3. Gather sufficient information to accurately identify and clarify inquirer's problems and needs, explore needs beyond the presenting problem, looking at short- and long-term solutions, and summarizing what they are requesting.
4. Search through the resource database, as well as other written and computer-based information resources to identify, evaluate and suggest potential programs and services.
5. Provide private and publicly funded options, help to prioritize, give specifics on eligibility and process to apply for services and resources.
6. Assist individuals in connecting with a resource if they are unable; provide advocacy.
7. Provide information about programs, services, both public and private, make referrals and help the individual get connected to appropriate services in person and/or on phone.
8. Provide short-term service coordination according to ADRC policy.
9. Provide follow up to determine outcomes and provide additional assistance in locating resources and arranging services. Research additional or alternative resources.

10. Provide information about publicly funded long-term care and assists individuals throughout the eligibility determination and enrollment process.
11. Administer the Long-Term Care Functional Screen (LTCFS), which involves the review of medical records, to determine functional eligibility.
12. Coordinate enrollment into community based long term care programs by ensuring eligibility criteria is met and completing unbiased enrollment counseling. Complete disenrollment counseling and program change counseling and coordinate this process.
13. Work in conjunction with community partners, such as, law enforcement, Adult Protective Services, the Division of Health, and the Division of Behavior Health to ensure consumer safety and well-being.
14. Assist individual in completing Medicaid applications and other public benefit programs (e.g., Foodshare) applications, if applicable.
15. Collect preliminary financial data (including medical and remedial expenses) and refer to Capital Consortium (CDPU) for financial eligibility determination.
16. Participate in various transition activities designed to help youth who have a disability transition from school to the adult service system.
17. Participate in program development, marketing and outreach activities. Represent the ADRC at public information fairs, in community advisory groups and in agency work groups/committees as requested.
18. Maintain accurate and complete documentation in a timely fashion with complete notes in the database that contain accurate information without judgment.
19. Complete ADRC MA 100%-time reporting in a timely manner and attend on-going MA training.
20. Participate in Quality Assurance/Quality Improvement projects and activities.
21. Arrange work schedule as necessary or directed to meet the program and consumer service needs. Participate in staff meetings and training activities as directed.
22. Comply with applicable federal, state, and local laws, administrative rules, established agency procedures and accepted professional standards.
23. Participate in on-going training, maintaining current knowledge to ensure compliance with federal and state regulations.
24. Maintain the confidentiality of client information as required by State and Federal laws and regulations and professional practice standards.
25. Communicate with management and peers concerning consumer issues and unit policies and procedures.
26. Perform other ADRC duties as assigned by the ADRC Director or ADRC Assistant Director. Maybe required to do activities outside normal business hours as directed.

#### **IV. Educational Requirements**

1. A bachelor's degree (preferably in a health or human services related field) or a license to practice as a registered nurse in Wisconsin pursuant to s. 441.06 Stats, and
2. The equivalent of at least one (1) year of full-time experience in a health or human service field, working with one or more of the client populations served by the Aging and disability Resource Center. Qualifying work experience may be paid or unpaid and may include internships, field placements and volunteer work.

3. DHS acknowledges that applicants who do not have the requisite education and/or experience described above may possess other skills or experiences that meet the needs of local community and agency. ADRCs must obtain approval from DHS to hire an individual who does not meet the education and/or experience requirements and receive approval from DHS before making a job offer.
4. Ability to obtain Long-Term Care Functional Screen certification within six months of hire.

**V. Knowledge, Skills, Licensure and Experience Required**

1. Outstanding interpersonal and leadership skills, problem-solving and organization abilities, as well as the ability to work harmoniously, constructively, and cooperatively with other professionals, clients and their families, community service providers, members of the general public, etc.
2. Strong writing skills, and the ability to complete a variety of professional documents, assessments, and reports.
3. Strong listening and oral communication skills.
4. Ability to follow directions, apply fairly the appropriate agency policies and complete projects in a timely manner.
5. Ability to work with minimal supervision, focusing on consumer service, in a fast-paced and stressful environment with an unhurried attitude.
6. Ability to maintain the confidentiality of client, staff, and agency information.
7. Ability to keep timely, clear, and complete case records.
8. Ability to learn and assimilate new information quickly.
9. Ability to travel throughout Columbia County, possess a valid Wisconsin driver's license, own transportation, and ability to maintain automobile liability insurance.
10. Ability to maintain regular, consistent, and reliable attendance.
11. Skill in operating a computer and maintaining computerized databases.
12. Knowledge of federal and state laws that regulate programs serving older adults and people with physical and/or intellectual/developmental disabilities.
13. Knowledge of social, medical, financial, and vocational factors that impact adults who are older or have physical and/or intellectual/developmental disabilities.
14. Knowledge of counseling and interviewing techniques including motivational interviewing and trauma informed care.
15. Ability to attend and successfully complete initial and ongoing training as required by the Wisconsin Department of Health Services (DHS) and the Aging and Disability Resource Center (ADRC).
16. Applicants must pass background checks.

## **VI. Physical Requirements**

1. Requires the ability to coordinate eyes, hands, feet, and limbs in performing moderately coordinated movements. Ability to grasp and place objects.
2. Requires the ability to operate, maneuver and/or provide simple but continuous adjustment on equipment such as computer/laptop, other office machines, and materials used in performing essential functions.
3. Tasks involve the ability to exert light physical effort in sedentary to light work, but which may involve some lifting, carrying, pushing, and pulling of objects weighting five to ten pounds, going up/down stairs.
4. The normal work environment for this position is in an office, but frequent travel is required to a variety of locations, including private homes. The employee is frequently required to sit.

This position description should not be interpreted as all inclusive. It is intended to identify the major responsibilities and requirements of the job. The employees may be requested to perform job-related responsibilities and tasks other than those stated on this position description.

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