

**Crawford County Aging & Disability Resource Center  
Position Description**

<b>POSITION TITLE: INFORMATION &amp; ASSISTANCE SPECIALIST</b>	<b>DEPARTMENT: AGING &amp; DISABILITY RESOURCE CENTER</b>
<b>REPORTS TO: Director</b>	<b>PAY GRADE: Professional - Grade 6</b>
<b>DATE: 12/2/2025</b>	<b>HOURS PER WEEK: 37.5 – Full time</b>

**PURPOSE OF POSITION:**

The purpose of the Information & Assistance Specialist position is to provide the general public, but particularly adults who are elderly, physically disabled, developmentally disabled, or with mental health or substance use disorders with information, referral, and assistance to a wide range of community resources; help inform and educate people about their options; assist in connecting them to programs, services and public benefits; and provide intake, eligibility determination and enrollment into long-term managed care.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

This description has been prepared to assist in evaluating duties, responsibilities and skills of this position. It is not intended as a complete list of specific responsibilities and duties, nor is it intended to limit duties to those listed. It is understood that the Supervisor has the right to assign, direct, and modify duties and responsibilities listed and that duties not mentioned that are of similar kind or level or difficulty shall not be excluded.

Follow established policies, procedures and quality standards to provide information, referral and assistance to people contacting the ADRC.

- Use telephone skills and interviewing techniques, such as active listening, to communicate by phone, in person and in writing to establish a rapport;
- Gather sufficient information to accurately assess consumer's purpose of contact and needs;
- Use information and referral resource database, as well as other written and computer-based information resources to identify, evaluate and select potential programs and services;
- Provide unbiased information about programs, services and public benefits, make referrals, and, when needed, help customers get connected to appropriate services;
- Provide follow-up and/or short-term service coordination, as needed, to determine outcomes and provide additional assistance in locating resources, making referrals, and arranging services;
- Gather and document information about callers for local and regional recordkeeping and analysis, required state reports and quality reviews.

Follow established policies, procedures and quality standards to provide options counseling to help inform and educate consumers about their options for long-term care and services:

- Accept referrals from area nursing homes, CBRF's, hospitals, clinics, or other organizations, and identify customers in need of options counseling;
- Make arrangements for face-to-face contact with customer, and if desired, their family members. Provide information and help customer identify their current and future needs; evaluate resources, including private-pay resources; and consider various options for care and services;
- Gather information and complete required recordkeeping and reporting in a timely manner.

Follow established policies, procedures and quality standards to provide managed long-term care intake, determine functional eligibility and coordinate enrollment into the managed care organization:

- Provide information about the long-term care programs available and assist customers throughout the eligibility determination and enrollment process;
- Administer the Long-Term Care Functional Screen to determine functional eligibility;
- Collect preliminary financial data and refer to Economic Support Unit for financial eligibility determination, provide hands-on assistance as needed with Medicaid application;
- Provide enrollment counseling, enroll customers who are functionally and financially eligible into the long-term care program of their choice, and help transition customers into program;
- Coordinate eligibility determination and enrollment activities with staff from the long-term care program and Economic Support Unit to make process as seamless for customers as possible;
- Complete required recordkeeping and reporting in a timely manner.

Other Duties as Required or Assigned:

- Be responsible in Quality Assurance/Quality Improvement projects and activities;
- Contact ADRC customer when an appeal/grievance regarding long term care program application is made to provide the individual information about and actions related to formal and informal grievance options available;
- Participate in regional I & A meetings to address program and quality issues.
- Be responsible in various transition activities designed to help youth who are disabled transition from school to the adult world;
- Participate in marketing and outreach activities;
- Arrange work schedule as necessary to meet the program and customer service needs, including meeting with customers and/or their families evenings or weekends, as needed; Be willing to complete home visits or meet at alternative locations outside of office;
- Participate in case reviews with supervisor, local staff meetings, and training activities;
- Represent both Regional and Prairie du Chien Aging & Disability Resource Center of Eagle Country to the community at large through professional interaction, clinical consultation, public speaking, media presentations, and participation in community advisory groups as requested;
- Comply with applicable federal and state laws, administrative rules, established agency procedures and accepted professional standards;
- Participate in on-going training, maintaining contemporary knowledge to ensure compliance with federal and state regulations;
- Maintain the confidentiality of client information and protected health information as required by State and Federal regulations, including the Health Insurance Portability and Accountability (HIPAA) Act of 1996;
- Perform 100% time reporting in appropriate database to account for all time during shift;
- Perform other duties as needed or assigned to support the mission of the regional and satellite Aging & Disability Resource Center of Eagle Country;

## **MINIMUM TRAINING AND EXPERIENCE REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS:**

- Bachelor's degree in Social Work, Human Services or related field.
- Must have at least one year of experience working with elderly or individuals with developmental disabilities, physical disabilities, mental health or substance use disorders, who constitute target populations of the Resource Center.
- Must take and pass the on-line State Functional Screen Training Course within 2 months of hire.
- Must take and pass the Alliance of Information & Referral Systems (AIRS) certification test for Information & Referral Specialist within one year of hire.
- Knowledge of public programs, Medicare, Medical Assistance, Social Security, and SSI preferred.
- Working knowledge of computers, computer programs and data entry.
- Current driver's license and unlimited access to reliable transportation.

## **PHYSICAL AND MENTAL ABILITIES REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS:**

### **Language Ability and Interpersonal Communication**

- Ability to comprehend and interpret a variety of documents including client psychological assessments, medical diagnosis and medication recommendations, financial reports, letters and memos, State and Federal rule and regulations, manuals, professional journals and papers, job applications, insurance forms and budget sheets;
- Ability to prepare a variety of documents including client service plans and recommendations, program evaluations, client assessments and treatment plans and therapy notes;
- Ability to record and deliver information, explain procedures and instruct staff and clients;
- Ability to communicate effectively with clients, supervisor, physicians, other health professionals, law enforcement, the general public, hospital, clinic and school personnel, and department staff both in person and in writing;

### **Mathematical Ability**

- Ability to add, subtract, multiply and divide, calculate decimals and fractions;
- Ability to compare, count, differentiate, measure and/or sort data or information;
- Ability to classify, compute, tabulate and categorize data.

### **Judgment and Situational Reasoning**

- Ability to apply abstract thinking to perform tasks;
- Ability to work independently;
- Ability to interpret a variety of instructions furnished in written, oral, diagram or schedule form;
- Ability to use independent judgment frequently in non-routine situations;
- Ability to solve practical problems and deal with a variety of concrete variables in situations;
- Ability to analyze data and information using established criteria, in order to define consequences and to consider and select alternatives;
- Ability to apply situational reasoning ability by exercising judgment in situations involving the evaluation of information against measurable criteria;
- Ability to use functional reasoning development in the performance of semi-routine functions involving standardized work with some choice of action.
- Ability to manage time effectively, make decisions about evaluating time sensitive situations, and considering client safety when managing time and caseload.

**Physical Requirements**

- Ability to coordinate eyes, hands, feet, and limbs in performing coordinated movements in operating educational aids and office equipment;
- Ability to exert moderate effort in sedentary to light work, including stooping, kneeling and crouching.
- Ability to operate a motor vehicle.

**Environmental Adaptability**

- Ability, in regard to environmental factors such as temperature variations, noise, disease and/or dust to work under moderately safe and comfortable conditions.
- Ability to visit environments with a moderate risk for disease or physical harm.

**Crawford County is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the county will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.**

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**Employee's Signature:****Date:**

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**Director's Signature****Date:**