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|  <b>Area Agency on Aging</b><br>PALM BEACH/TREASURE COAST, INC. | <b>Position Title</b>    | Intake Specialist |
|                                                                                                                                                  | <b>Position Category</b> | Non-Exempt        |
|                                                                                                                                                  | <b>Reports To</b>        | Intake Supervisor |
|                                                                                                                                                  | <b>Date</b>              | September 2025    |

### Position Summary

Under the direction of Supervisor, perform Intake duties for the Helpline with the purpose of assessing the needs of consumers, and matching them with available services. This activity includes completing 701 S screenings and annual re-screenings and other related programs with the goal of facilitating the eligibility of consumers waiting for services through reassessments designed to coordinate/integrate various publically funded programs.

### Essential Functions

- Plan and organize work effectively to minimize customer/consumer wait time and to provide efficient, timely and consumer friendly intake services
- Assist supervisor in meeting weekly productivity benchmarks with the goal of completing new assessments within three days of referral to intake and reassessments in the month they are due
- Assist with prioritization of consumers for program and service eligibility by completing a 701S assessment in CIRTS in accordance with DOEA program standards
- Ensure consumers have a complete understanding of pertinent policy information and program requirements regarding available care options
- Be able to provide accurate explanation to consumers about all programs and services including CCE, ADI, OAA, HCE and SMMCLTC
- Work with consumers over the phone to elicit needed information in order to properly assess needs and make eligibility determination or to make referrals to appropriate community resources.
- Ensure consumer receive appropriate written communication regarding the screening and reassessment process
- Enter and maintain Intake information using a CIRTS data base and complete various forms and reports as needed to properly process consumer throughout the intake process
- Accurately enroll clients in CIRTS for programs based on eligibility criteria
- Initiate or suggest improvements/enhancements to address and resolve any quality related issues
- Assist with the process of ensuring service standards and outcome measures are met in regards to providing appropriate quality consumer care in alignment with funder compliance requirements
- Complete screening following the DOEA training instruction to meet all quality assurance measures and ensure for accuracy and completeness of screenings
- Ensure appropriate documentation is entered into eCIRTS and resource data bases
- Responsible for ensuring compliance with program requirements and regulations and complying with all security and confidentiality regulations
- Completes assigned duties as stated in the Agency's Comprehensive Emergency Management and Continuity of the Operations Plan.

### Non-Essential Functions

- Attends conferences or training programs as assigned
- Lends support to other departments with special projects and events
- Attends Agency staff meetings to keep up to date on important matters impacting all staff
- Performs other duties as assigned

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|                                                                                                                                                  | <b>Date</b>              | September 2025    |

**Other Competencies Related to Knowledge, Skills and Abilities and Other Personal Characteristics (note: not all may apply to every position)**

- Ability to demonstrate effective communication skills by conveying necessary information accurately, listening effectively and asking questions when clarification is needed
- Ability to work effectively in a fast paced environment while displaying patience and calmness to consumers
- Ability to read, interpret and apply rules, laws and procedures
- Ability to effectively team; provide outstanding consumer/customer service; and display effective time/project management abilities
- Ability to establish and maintain professional communications and relationships with various organizations/agencies and be able to effectively interact with other staff members and seniors
- Ability to maintain confidentiality and display empathy throughout the Intake process
- Ability to demonstrate the core values of the agency
- Knowledge of local programs, community resources and services as well as eligibility guidelines of DOEA programs; eligibility requirements of Medicaid programs and internal Agency practices and policies
- Knowledge of needs assessment processes and interviewing/counseling techniques and ability to make sound decisions in the best interests of the consumers

**Minimum Qualifications**

- Possess a high school diploma or GED and a minimum of two years of work experience in information and referral/call center services, caseworker, case manager, intake specialist or similar human/customer services related OR
- Possess an associate's degree from an accredited college or university with a minimum of one year of experience in information and referral/call center services, case worker, case manager, intake specialist or similar human services/customer related work OR
- Possess a bachelor's degree from an accredited college or university and some customer service experience
- Will be required to successfully complete specialized training
- Knowledge of Microsoft Office Suite and other specialized programs
- Knowledge of Internet Search Engines

**Physical Requirements and Working Conditions**

Prolonged periods of sitting and working on a computer while talking with clients  
 Minimal Lifting up to 20 pounds

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***The Area Agency on Aging Palm Beach/Treasure Coast retains the right to change this job description any time. The Area Agency on Aging Palm Beach/Treasure is an Equal Opportunity Employer.***

***Employee has acknowledged the receipt of his/her job description. If the employee has any questions regarding his/her duties, he/she should speak with the Supervisor or contact the Human Resources Department.***

***Print Name:***

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***Signature:***

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***Date:***

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