

 Area Agency on Aging PALM BEACH/TREASURE COAST, INC.	Position Title	Information and Referral Specialist
	Position Category	Non-Exempt
	Reports To	Information and Referral Supervisor
	Date	September 2025

Position Summary

Under the direction of the supervisor, this position provides information and referral services to seniors, people with a disability and caregivers calling the Helpline. Specialists use a data base to problem solve and provide resources for callers in Palm Beach, Martin, St. Lucie, Indian River and Okeechobee Counties. Specialists are well versed in a variety of long-term care options and SHINE Medicare services.

Essential Functions

- Ensure appropriate documentation is entered into data base
- Schedule appointments for Intake and SHINE using scheduling program.
- Provide information and referral services to clients over the phone or in person, assisting walk-ins as required
- Identify and problem solve solutions to caller's concerns using a resource database and knowledge of other community resources.
- Recognize when a caller is experiencing a crisis or requires advocacy and provide appropriate assistance and referrals
- Provide solution focused answers to callers that empower them
- Work with consumers over the phone to elicit needed information in order to properly assess needs and make eligibility determination
- Identify and relay information on appropriate referrals to community resources
- Provide appropriate customer service and the ability to develop rapport with callers
- Assist callers by locating alternatives resources via the Internet or other networking methods if possible, when unmet needs exist
- Complete follow-up with clients given a referral within the 14 day requirement
- Respond to FAX referrals within three business days
- Ensure data entry in database comply with DOEA and Agency procedures
- Respond within 48 hours to all voicemail and email requests
- Receive positive feedback on satisfaction surveys
- Maintain client confidentiality and HIPAA compliance
- Look up information in database which will assist with identifying client's status on the waiting list
- Responsible for ensuring compliance with program requirements and regulations and complying with all security and confidentiality regulations
- Demonstrate ability to monitor queue using call center software

Non-Essential Functions

- May participate in outreach or presentations as requested
- Attend training programs as assigned by supervisor
- Lend support to other departments with special projects and events
- Attend Agency staff meetings to keep up to date on important matters impacting all staff
- Performs other duties as assigned

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Other Competencies Related to Knowledge, Skills and Abilities

- 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 compassion and calmness to consumers including disabled adults, seniors, caregivers, stakeholders and community partners
- Ability to establish and maintain professional communications and relationships with various organizations/agency partners and be able to effectively interact with other staff members and seniors
- Ability to effectively participate as part of a team with a common goal of providing good customer service
- Ability to maintain confidentiality and display empathy
- Ability to read, interpret and apply rules, laws and procedures
- Knowledge of available ADRC administered programs; knowledge of local programs, community resources and services as well as eligibility guidelines of DOEA and Medicaid programs
- Knowledge of Microsoft Office Suite
- Knowledge of Internet Search Engines

Minimum Qualifications

- Possess a high school diploma or GED and a minimum of one year of work experience OR
- Possess an associate degree from an accredited college or university OR
- Possess a bachelor's degree from an accredited college or university
- Will be required to successfully complete specialized training
- Bi-lingual Preferred (English / Spanish / Creole)

Physical Requirements and Working Conditions

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

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. Employees acknowledge the receipt of this job description. If the employee has any questions regarding job duties, speak with their supervisor or contact the Human Resources Department.

Print Name:

Signature:

Date: