

POSITION TITLE: Engagement Specialist/ Support Staff III

<b>CENTER:</b>	<b>Peterson</b>	<b>DEPARTMENT:</b>	<b>Access &amp; Adult Clinical Services</b>
<b>LOCATION:</b>	<b>800 Preston Ave</b>		
<b>FSLA STATUS:</b>	FSLA Non-Exempt	<b>INCLEMENT STATUS:</b>	Non-Essential
<b>GRADE:</b>	9	<b>SCHEDULE: M-F, 8-5</b>	FT
<b>GROUP:</b>			40
<b>Job Requirements</b> <input checked="" type="checkbox"/> Annual TB <input type="checkbox"/>			

#### GENERAL STATEMENT OF RESPONSIBILITIES:

This is an FLSA non-exempt position. The Engagement Specialist is responsible for outreach and retention activities for consumers enrolled in Access and Adult Clinical Services at Region Ten. The Engagement Specialist plays a critical role in supporting individuals who have initiated outpatient services but are at risk of falling out of care due to barriers such as scheduling conflicts, transportation, financial hardship, or other psychosocial stressors. This role focuses on outreach, re-engagement, and coordination with clinicians to reduce no-show rates, prevent premature discharges, and ensure continuity of care for individuals across our outpatient services.

In addition to client engagement, this role provides administrative support—including insurance verification, centralized scheduling, billing follow-up, and front-desk/back-up coverage. The Engagement Specialist works independently under standard practices and refers questionable situations to the Director of Access. Standard practices allow for the independent accomplishment of recurring tasks and use of own initiative for prioritizing the work schedule. In carrying out position duties, he/she performs in accordance with applicable professional ethics and established Region Ten policies.

The HIPPA access level for this position is Level Two.

#### MAJOR DUTIES:

The essential functions of this job are starred below (\*) under "Major duties."

1. \*Monitors consumer engagement and attendance in services through program reports in order to manage capacity within program.
2. \*Contacts consumers referred by centralize scheduling or otherwise identified as not attending scheduled services appointments to confirm if they wish to continue receiving services. The purpose of this contact is to:
  - a. Identify barriers to the consumer attending appointments and assist with addressing such barriers;
  - b. Identify Consumer strengths and goals, and provide referrals to other services in Adult Outpatient or different levels of care, if appropriate;
  - c. If consumers cannot be re-engaged in treatment services, create Discharge/Transfer planning for consumer and facilitate the appropriate program release.
3. \*Accurately and timely data entry including call logs, financials, and updates on client demography.
4. \*Scan, file, and archive client documents in a timely manner.
5. \*Assists team with verification of client insurance and eligibility.
6. \*Fields calls from consumers with questions about billing and follows up/ problem solves billing issues.
7. \*Coordinates and collaborates with partner agencies with regards to referrals and exchange of information as related to MOU's and/or contracts between parties, while maintaining HIPPA compliance.
8. \*Meet with consumers individually to assist with re-engagement with service provision.
9. \*Maintains a professional demeanor and attitude.
10. Provides and acts as back-up for centralized scheduling for the Adult Outpatient team and front desk reception at Peterson.
11. Other job-related duties as assigned.

#### QUALIFICATIONS:

General Statement: The ideal candidate will have a Bachelor's degree in a Human Services related field or at least one year of client engagement, case management, or outreach experience in clinical or community settings. Preferred qualifications include experience with data collection and reception techniques and ability to use trauma-informed language when communicating to consumers.

**EDUCATION:** Bachelor's degree in Social Work, Psychology, Human Services or related field; must have QMHP status or have education and experience to apply for QMHP-E status.

**EXPERIENCE:** At least one year of client engagement, case management, or outreach in a clinical or community-based setting preferred.

**CERTIFICATION/LICENSE:**

The incumbent needs to possess the following knowledge, skills and abilities:

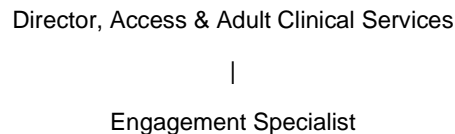
**Knowledge of:** Mental health and substance use diagnosis and services (required); Trauma-informed approaches to clinical care, with an understanding of the potential psycho-social-economic barriers that may prohibit consumers from accessing services; Community Resources.

Microsoft Office Suite including Word, Outlook and Excel (preferred); Standard office practices, billing/insurance procedures, and medical terminology (preferred); interview techniques (required).

**Skills in:** Verbal and written communication; active listening and problem solving (required); reception and secretarial techniques (required); basic bookkeeping (preferred); math (preferred); use of office equipment, including computers; keyboarding and data entry (required); interpersonal skills (required).

**Abilities to:** Build rapport and communicate with a wide variety of people (required); maintain confidentiality (required); recognize and function in a crisis situation (required); follow oral and written instructions (required); work independently, and at times, in office alone (preferred); manage attendance in order to ensure full time coverage needed.

**POSITION ORGANIZATION CHART:**



I have reviewed this job description and acknowledge the duties as well as the included KSA (knowledge, skills, abilities). I also understand the performance standards as they apply to this position.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name Printed

\_\_\_\_\_  
Date

Position Description updated: July 8<sup>th</sup>, 2025

Template Language: English