

## Job Description

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<b>Job Title:</b>	Client Service Representative
<b>Department:</b>	Campus Wellness
<b>Reports To:</b>	Client Customer Service Supervisor
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 4
<b>Effective Date:</b>	September 2020

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### **Primary Purpose**

The Campus Wellness Administration team serves the University of Waterloo community by supporting all units within Campus Wellness (Health Services, Counselling Services and Health Promotion) with effective, efficient, collaborative, client-focused administrative service.

This role is accountable to the Client Customer Service Supervisor to help create and maintain a positive student-centered environment, with exceptional client care and customer service, as the first point of contact for those seeking information and services in all Campus Wellness (CW) locations. In addition to direct customer service requiring effective triaging of competing priorities from multiple sources, this role is also responsible for a wide variety of administrative tasks to promote quality client care, and to support the efficient operation of Campus Wellness services.

This position requires frequent contact with health care professionals that may include physicians, nurses, counsellors, psychologists, psychiatrists, and interns/residents.

### **Key Accountabilities**

#### **Customer Service and Client Support**

- Acts as a first point of contact for clients accessing CW services, supporting a safe and welcoming environment
- Uses verbal de-escalation skills to respond to difficult behavior
- Supports client appointments through booking, cancelling, and rescheduling
- Collects and processes accurate and up to date client information
- Assesses client needs and provides information on appropriate resources, programs, or services at CW, the University, and in the community
- Accesses appropriate supports for complex inquiries and requests for urgent assistance
- Ensures adherence to CW and University policies and practices

#### **Administrative Support**

- Assists in daily workflow of CW through general administrative support including the distribution of information, sharing of resources, and responding to staff requests for assistance
- Maintains up-to-date forms and documentation for use by staff members and clients, including consent forms, clinical note forms, and resource and reference documentation
- Independently navigates a high volume of competing requests and multiple interruptions
- Actively engages in the development, implementation, and ongoing maintenance of relevant administrative procedures and protocols

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- Identifies opportunities for improvement of client experiences, staff support, and general workflow
- Assists with training and support for new employees
- Monitors and maintains office supplies in conjunction with the Resource Assistant and requests orders for products or approved equipment as required
- Assists with on-going or one-time projects, as delegated by a Client Customer Service Supervisor

### **Handling Confidential Information**

- Adheres to all guidelines and regulations regarding the collection, use, retention and destruction of personal health information (FIPPA, PHIPA, and University policies and procedures as outlined by the Office of the Secretariat)
- Performs accurate and timely data entry by creating, processing, and validating client documentation
- Maintains up-to-date student information in the Electronic Medical Record
- Accesses databases to support clinic functions

### **Collaboration and Relationship Management**

- Develops and maintains positive working relationships by collaborating with Campus Wellness colleagues
- Engages with relevant departments and partners across campus to provide holistic care for students requiring additional supports

### **Receptionists may specialize in supporting Counselling Services or Health Services and be responsible for additional tasks based on their specialization:**

- Maintains client lists for access to services (including waitlists for counselling, psychological assessments, and psychiatry assessments), and is responsible for appropriate client assignment based on multiple factors (including urgency, availability, and preferences)
- Processes inquiries, requests, and referrals for assessments and group therapy, including the collection of required external documentation, responsibility for enrolling clients in the appropriate group therapy, and ensuring documentation of the process and attendance is updated in the Electronic Medical Record
- Supports processing and fulfilling client requests for personal health information from their clinical records
- Supports Psychiatrists and Case Managers in communication with off-campus partners (including hospitals and pharmacies)
- Monitors and responds to information/inquiries, referring complex queries to the Client Customer Service Supervisor as needed
- Assists with immediate support when students present in distress until they are connected with an appropriate staff member
- Responsible for relaying important information to appropriate staff members regarding the use of quiet rooms, including safety concerns
- Responds to documentation requests with short deadlines from physicians

*\*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

## Required Qualifications

<b>Education</b> <ul style="list-style-type: none"><li>• Health administration diploma, medical terminology course, or equivalent experience preferred</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• At least one year of receptionist/customer service work experience in healthcare facility (preferably post-secondary setting)</li><li>• Experience working in both mental health and physical health care settings preferred, with the proven ability to deal with highly confidential and sensitive information</li><li>• Experience working with individuals who have a variety of accessibility needs, socioeconomic backgrounds, and cultural backgrounds</li><li>• Experience working within PHIPA and FIPPA guidelines preferred</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Extensive experience with an electronic health records system is essential; experience with Accuro preferred</li><li>• Working knowledge of MS Word, Excel, PowerPoint</li><li>• Exceptional client service orientation, professionalism and assertiveness</li><li>• Demonstrated commitment to teamwork, attention to detail, flexibility, and accuracy</li><li>• Ability to respond to competing demands in a fast-paced environment</li></ul>

## Nature and Scope

- **Contacts:**  
Internal Contacts: All Campus Wellness administrative and health care professionals, including physicians, nurses, counsellors, psychologists, psychiatrists, and interns/residents. All members of the University of Waterloo Community (students, staff, and faculty).  
External Contacts: Student family members and community partners.
- **Level of Responsibility:** Responsible for working both independently and collaboratively, and performing regular duties with relative independence and exercising strong judgement. Assist in identifying and addressing administrative or logistical needs of clinicians/the department. Exercises judgement and discretion with regard to confidentiality and well-being of individuals. Responsible for all areas outlined above.
- **Decision-Making Authority:** Responsible for decision making and problem solving within the responsibilities outlined above, and the options available based on procedure/protocol. Complex situations are escalated to the most appropriate staff member (administrative supervisor, or clinical staff)
- **Physical and Sensory Demands:** Flexibility and responsiveness to a variety of administrative and clinical staff regarding day-to-day and long-term issues are required. Position may involve rotation between multiple locations where Campus Wellness services are delivered. May require light physical demands, including possible lifting and moving materials. Requires extended periods of sitting and concentrated use of visual senses.
- **Working Environment:** The position is exposed to stress and pressure associated with administrative responsibilities in a clinical setting. It involves moderate psychological risk resulting from difficult and unavoidable exposure to disagreeable and uncomfortable environmental and psychological conditions. Risk of exposure includes: airborne and contact-based illnesses; verbally and physically aggressive individuals; individuals dealing with a mental health crisis (including suicidal ideation and immediate risk of harm to self and others).

Located indoors in a comfortable, fast-paced office environment populated by clinical, administrative

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staff, as well as clients (University of Waterloo students, staff, faculty, and student family members). There may be unusual hours or schedules, multiple and/or tight deadlines beyond one's control and constant interruptions (e.g. phone calls, e-mails, urgent support requests, varying student volumes at different times of the year). At times, hours of operation include from 8:00 am to 8:00 pm. Position requires flexibility to occasionally shift working hours to include evenings or to accommodate required staffing levels.