

Job Description



Job Title:	Lead Client Service Representative
Department:	Campus Wellness
Reports To:	Client Service Manager
Jobs Reporting:	None
Salary Grade:	USG 6
Effective Date:	May 2021

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, and client-focused administrative service.

This role is accountable to the Client Service Manager to help create and maintain a positive student-centered environment, with exceptional client care and service, as the first point of contact for those seeking information and services in at Campus Wellness. In addition to direct client service requiring effective triaging of competing priorities from multiple sources, this role is responsible for a number of administrative tasks ensuring quality client care and supporting efficient operation of Campus Wellness services.

In addition to responsibilities and priorities of a Client Service Representative, the Lead Client Service Representative role includes an intermediate level of leadership and support for Client Service Representatives focusing on training and coaching.

Key Accountabilities

Client Support

- Act as a first point of contact for clients accessing Campus Wellness services, supporting a safe and welcoming environment;
- Use verbal de-escalation skills to respond to difficult behavior; provide support and coaching to Client Service Representatives when they resolve complex situations, escalating to Client Service Manager as necessary;
- Assist with immediate support when students present in distress until they are connected with an appropriate clinician.
- Support in-person and virtual appointments through booking, cancelling, and rescheduling;
- Collect and process accurate and up-to-date client information including the scanning and indexing of incoming diagnostic and medical reports;
- Assess client needs and provide information on appropriate resources, programs, or services at Campus Wellness, the University, and in the community;
- Access appropriate supports for complex inquiries and requests for urgent assistance;
- Support the assignment of clients to providers by appropriately screening for multiple factors (e.g. urgency, availability and client/clinician preferences);
- Receive and document incoming client payments in EHR, providing receipts to clients when required; adhering to financial protocols and ensuring electronic and hard copy documentation accurately reflects services rendered and incoming payments;
- Reconcile cash receipts.

Leadership of Client Service Representatives

- Provide on-site and immediate leadership and support for Client Service Representatives;

- Create staff schedules and adapt them in response to frequently changing factors; ensure all shifts have proper coverage (ex. client volume, staff absences, time off requests, emergency coverage); provide coverage for short notice needs and absences as necessary;
- Collaborate and trouble-shoot with Client Service Manager to provide/ensure appropriate staff coverage in all Campus Wellness venues.
- Coordinate daily breaks and lunches of Client Service Representatives to ensure sufficient coverage;
- Monitor incoming tasks through Accuro and coordinate with Client Service Representatives for completion;
- Optimize daily appointments schedule to use clinicians' appointments efficiently;
- Act as first level of escalation for difficult or complex client service situations;
- Support Client Service Representatives when a clinic or clinician's appointments need to be cancelled or rescheduled (ex. clinic closure, long-term provider absence); caseloads need to be dispersed among other clinicians, or alternate arrangements made; support Client Service Representatives in communicating alternate arrangements to clients/patients;

Training Coordination / Quality Assurance

- Collaborate with Client Service Manager to coordinate orientation, training and support for new Client Service Representatives;
- Act as primary trainer, involving other Client Service Representatives to assist with training in specific areas;
- Ensure staff training regimen results in Client Service Representatives being fluent with appropriate resources, programs, and services at Campus Wellness, the University, the community and especially with interconnections between Campus Wellness units;
- Maintain electronic training documentation (procedures, protocols, guidelines) for Client Service Representative roles in all venues, providing visuals to assist in training (ex. algorithms, decision trees);
- Track ongoing workflow changes and reminders, ensuring documentation is current and reviewed by Client Service Representatives on a regular basis;
- Provide ongoing feedback to Client Service Manager regarding Client Service Representative performance to support and recognize Client Service Representatives' learning and improvement;
- Identify opportunities for improvement of client experience, staff support, and general workflow; (ex. process improvement within the Electronic Health Record, identifying pain points from student perspective);
- Perform regular and random audits of Client Service Representation documentation, task and bookings within the Electronic Health Records to ensure accuracy and consistency, and to provide refresher training as needed.

Administrative Support

- Oversee the maintenance of client lists in the Electronic Health Records for access to services including wait lists for counselling, psychological assessments, and client/clinician preferences.
- Process requests and referrals for internal assessments, dietitian appointments, and closed group therapy, collecting and sending required documentation;
- Oversee general inquiries to generic e-mail accounts, ensuring consistency and timeliness in responses, assisting with or escalating complex queries, and monitoring e-mail reminders (ex. cancellations, reports);
- Assist in daily workflow of Campus Wellness through general administrative support for staff (ex. distribution of information, sharing of resources, etc.);
- Assist Client Service Manager in distributing administrative tasks related to special projects and working groups;
- Maintain basic fluency with primary Client Service Coordinator role tasks (ex. entering Campus Wellness provider and CSR schedules and provider booking preferences);
- Assist with ongoing and one-time projects or initiatives as delegated by a Client Service Manager;
- Contribute to Campus Wellness initiatives and committees, as requested by Client Service Manager.

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Handling Confidential Information

- Adhere to all guidelines and regulations regarding the collection, use, retention and destruction of personal health information (ex. FIPPA, PHIPA, UWaterloo Policies and procedures);
- Perform accurate and timely data entry by creating, processing, and validating client documentation and demographics, cross-checking across multiple platforms;
- Process daily incoming electronic and hard-copy documentation; accurately attaching to client files/charts in Electronic Health Record;
- Access non-clinical databases to support clinic functions (ex. Quest, SharePoint, Student Portal).

**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

Education

- Health administration diploma, medical terminology course, or equivalent experience preferred

Experience

- At least two years of receptionist/client service work experience in healthcare facility, preferably a post-secondary setting
- Experience working with a collaborative team
- Experience providing informal training / coaching and support to colleagues
- Experience working in both mental health and physical health care settings preferred, with the proven ability to deal with highly confidential and sensitive information
- Experience working with individuals who have a variety of accessibility needs, socioeconomic and cultural backgrounds
- Experience working within PHIPA and FIPPA guidelines

Knowledge/Skills/Abilities

- Extensive experience with an Electronic Health Records system is essential (preference for Accuro)
- Recognized by peers as having demonstrated leadership skills, including modelling exceptional client service, professionalism, and assertiveness
- Demonstrated commitment to teamwork, attention to detail, flexibility, and accuracy
- Ability to respond to competing demands in a fast-paced environment
- Demonstrated ability to take initiative, and appropriately identify and resolve problems reactively and proactively
- Working knowledge of MS Word, Excel, PowerPoint

Nature and Scope

- **Contacts:** Internal Contacts: In addition to primary contact with Client Service Representatives, daily contact with Campus Wellness administrative professionals and multi-disciplinary health care providers. Contacts outside Campus Wellness include members of the University of Waterloo community (students, staff, and faculty and their family members). Contacts external to University of Waterloo include 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.

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- **Decision-Making Authority:** Responsible for decision-making and problem-solving within the responsibilities outlined above and the options available, based on procedure/protocol. First point of escalation for complex client service situations.
 - **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 short-notice coverage 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 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 (ex. 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. At times, position requires flexibility to shift working hours to include evenings to accommodate required staffing levels.