**Our mission is to provide people of all ages with help, hope, and the opportunity to succeed.**

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Counseling Administrative Assistant</th>
<th>FLSA Status</th>
<th>Non-Exempt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program/Department Reports To</td>
<td>Administration</td>
<td>Supervisory Responsibilities</td>
<td>No</td>
</tr>
<tr>
<td>Work Schedule</td>
<td>Office Hours follow business hours and may vary with supervisor approval; may include occasional evening and weekends.</td>
<td>CEO Approval Date</td>
<td>1/2020</td>
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**POSITION OVERVIEW**

The Counseling Administrative Assistant (CAA) will work to provide administrative support to the counseling program, provide backup support to the Front Desk Administrative Assistant and Sunbeam programs overall. This position will initiate and coordinate the Counseling clerical, billing, and database functions, secretarial functions required in effective implementation of administrative policies and procedures of Sunbeam Family Services.

All employees and volunteers are expected to be sensitive to our client’s cultural and socioeconomic characteristics, reflect Sunbeam Family Services core values and to perform at Sunbeam’s standards of excellence at all times.

**ESSENTIAL FUNCTIONS**

- Promoting, encouraging and displaying examples of leadership for the agency in accordance with the agency mission driven, employee first culture.
- Demonstrating capacity for providing developmentally appropriate and evidence-based practice, for exemplifying the values expected within the program, and for promoting the mission of the organization.
- Check in counseling clients.
- Verifies insurance eligibility.
- Preliminary billing liaison between counselor and accounting.
- Will work with accounting to provide billing statements and write-offs.
- Processing of referrals, referral relations, and internal referrals.
- Management of payment history and payor source.
- Tracking of client discharges.
- Facilitate intake of new clients both in person and over the phone.
- Scan miscellaneous documents.
• The Counseling Administrative Assistant will work to insure compliance with COA and HIPPA requirements as applied to the office environment.
• The Counseling Administrative Assistant will ask clients to complete initial and follow-up surveys during certain time periods of each quarter, as directed by the Counseling Director.
• Maintain client prioritization.
• Perform as Primary point of assistance for counselors related to the scope of the counseling office environment.
• Manage internal office enrollment in the event of any emergency evacuation
• Update of fee agreements and accounts.
• Generate Psych reports as requested by the Counseling Director.
• Assist clients, guests, and staff on a variety of support tasks.
• Ability to switch tasks spontaneously.
• Will serve as backup to the Front Desk Administrative Assistant.
• Follow systems to effectively organize information and provides it to others as needed.
• Effectively prioritize projects delegated by a variety of staff to accomplish tasks in the timeframe specified and at a high level of quality.
• Accurately communicate information in minutes, e-mail, memos and other written and verbal correspondence.
• Perform daily clerical duties, including answering and screening telephone calls, taking messages, sorting and distributing incoming mail and faxes, copying and collating.
• Greet and assists all visitors/callers in a courteous and helpful manner.
• Perform billing processes where applicable and works to collect receipts from various pay sources.
• Design and edit drafts of correspondence, reports, forms, charts, memos, and other documents, as needed.
• Provide clerical support to other administrative assistant levels; i.e. minor word processing of a routine nature, assisting in mass mailings, typing address labels, shredding confidential documents, assisting with catering orders.
• Processes all requests for Release of Confidential/Medical records to ensure policy is followed regarding the law when specifically assigned.
• Ensures that all reports and records are maintained accurately and promptly.
• Assists both clients, guests, and staff on a variety of support tasks.
• Ability to switch tasks spontaneously.
• Assist counselors related to the scope of the counseling office environment.

**OTHER DUTIES**

• Provide support for other duties needed in keeping with our mission, vision and values

**JOB QUALIFICATIONS**

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<tr>
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<th>Minimally Required</th>
<th>Preferred</th>
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<tbody>
<tr>
<td>Education</td>
<td>Bachelor’s Degree (or comparable experience) in fields related to the duties of this job</td>
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<tr>
<td>Experience</td>
<td>Must have knowledge of secretarial, office administrative procedures, and knowledge of use and operation of standard office equipment, at a</td>
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<td><strong>Skills and knowledge</strong></td>
<td><strong>Professional demeanor</strong></td>
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<td>Must be able to create concrete plans for area of responsibility in both the short (immediate to 3 months) and long (3 months to 1 year) term that demonstrate an understanding of the needs of a situation and the future implications of decisions.</td>
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<td>Must be able to identify the actions necessary to complete tasks and obtain results; understand and maintain a balance between results, process and relationships in accomplishing tasks.</td>
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<td>Work requires an extensive knowledge of office functions and an excellent command of the English language. Bilingual Spanish/English a plus.</td>
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<td>Must have knowledge of a variety of computer software applications in word processing, spread-sheets, database and presentation software.</td>
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<td>Must have high level of interpersonal skills to handle sensitive and confidential situations. Position continually requires demonstrated poise, tact and diplomacy.</td>
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<th><strong>Abilities</strong></th>
<th><strong>Some analytical ability is required in order to gather and summarize data for reports, find solutions to various administrative problems, and prioritize work.</strong></th>
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| **Bilingual Spanish/English speaking** | }
Work requires continual attention to detail in composing, typing and proofing materials, establishing priorities and meeting deadlines.

Establishes and maintains a reflective relationship for learning with the supervisor that is characterized by regularity, clear expectations, mutual sharing and feedback about the challenges and opportunities presented in the day-to-day work.

Local travel required and must have valid Oklahoma driver’s license and insurance as required by the position

Intermediate knowledge of computer applications, including word-processing software in a Windows environment and the ability to learn and master other computer technology/software programs as needed.

**Physical Demands:**
While performing the duties of this job, the employee is required to frequently communicate with staff and others, and must be able to exchange accurate information when doing so. The employee must be able to remain in a stationary position 50% of the time and occasionally move about inside the office to access file cabinets, office equipment, attend meetings, etc. Must be able to operate and use a computer. Must be able to detect, discern, distinguish, observe, inspect and compare. Must have excellent command of English language and grammar, both verbal and written. Occasionally must be able to move needed materials weighing up to 20 pounds. The qualifications, physical demands, and work environment described are representative of those an employee will encounter and must meet to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities.

**Work Environment**
The employee will work in an office environment, may work in close quarters with other staff and small children. The noise level in the work environment varies from moderate to loud; frequent chaotic situations will occur, characteristic to working with children ages 0 – 5 years. Employee must expect exposure to strong odors such as soiled diapers and clothes, and poor hygiene. May come into contact with childhood diseases and blood on occasion.
OTHER
The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. These statements are intended to describe the general nature and level of work performed by employees assigned to this position. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel or candidate and may be subject to change at any time.

SUNBEAM’S CORE VALUES

<table>
<thead>
<tr>
<th>Champion Spirit</th>
<th>Servant Heart</th>
<th>Sunny Attitude</th>
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<tbody>
<tr>
<td>We work like a champion every day: paying attention to details and performing with excellence</td>
<td>We exhibit humility in serving everyone; no job is below anyone and we all work together to get the work done</td>
<td>We bring a smile, a positive attitude and treat each other with respect, ensuring a pleasant work environment.</td>
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EQUAL OPPORTUNITY EMPLOYER
We are proud to be an EEO/AA/MF/Vets/Disabled.

SIGNATURE
By signing this job description, the employee/candidate affirms that (s)he possesses the knowledge, skills, and abilities necessary to perform the essential functions of the job as stated above, with or without reasonable accommodation. It is also understood that employment with Sunbeam is considered “at will,” meaning that either Sunbeam or an employee may terminate the employment relationship at any time with or without cause or notice. This job description is not intended in any way to create a contractual employment relationship. Sunbeam may also change this job description and the expected duties from time to time at its sole discretion.