

## **Client Services Data Specialist**

### **POSITION SUMMARY:**

The Client Services Data Specialist will assist in collecting Claims Conference Data, verifying the data collected, entering the information into the appropriate system, and preparing reports from the data collected. Effectively communicate with Program managers and vendors.

### **RESPONSIBILITIES:**

Responsibilities include the following, and other duties may be assigned:

Provide general secretarial duties relative to the position and to support the staff at the assigned JCS office including retrieving messages from voice mail and forwarding to appropriate personnel, answering incoming phone calls and forwarding to staff, taking and delivering messages, providing callers with address, directions, and other information as instructed, and receiving, sorting, and routing mail.

Collect all home care invoices from vendors and review them by client to ensure that the invoices match the accompanying timesheets; that hours do not overlap, and hours for services provided agree to the total amount billed on invoice.

Cross check the approved home care invoices with the bill voucher spreadsheet to ensure that the invoices match the hours ordered and that client does not exceed their approved hours.

Assist in creating Check Request for Accounts Payable Department for each vendor submitting homecare invoices for the month to be entered in MIP Accounting Software.

Enter approved home care hours in a CSV file which will be imported into the Claims Conference Diamond System. Once imported, ensure data is correct and send to Program Manager for final review.

Submit any invoices that are not approved for the Claims Conference Diamond System to Program Manager to bill separately.

Update the excel spreadsheet which captures "Match" spending on a monthly basis by client. The report includes client ID, Vendor Name, Hours toward the "Match", and the cash amount for all Claims Conference Programs.

Assist with any changes needed with Claims Conference program expenses and retain documents detailing required changes for the quarter for future reference.

Assist in producing monthly General Ledger reports for Non-Homecare Expenses related to Claims Conference and exporting those report to an excel format to sort expenses by month and by quarter and enter those expenses into Diamond.

Assist Program Director in redirecting expenses to programs that have available funds when funds are not available in the original program in Diamond and MIP. Retain files of necessary documentation of all changes for our records.

Assist with Detail Quarterly Data Entry Report for Claims Conference billing by Calendar Year.

Assist with any requests, reports, and concerns for Claims Conference.

Assist with all Claims Conference monitoring requests when representatives are onsite for monitoring.

## **MINIMUM QUALIFICATIONS:**

Associate's degree in Accounting or Business education and experience will be accepted on a year-to-year basis.

Minimum 2 years of Data Entry experience, required.

Strong computer skills and proficiency with Microsoft Office (Word, Excel, PowerPoint and Outlook), required.

Ability to communicate effectively both orally and in writing with clients and agency staff.

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals

Ability to manage multiple priorities

## **COMPETENCIES:**

To perform the job successfully, an individual should demonstrate the following competencies:

**Analytical** – Collects and researches data; uses intuition and experience to complement data; design workflow and procedures.

**Problem Solving** - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.

**Technical Skills** - Assesses own strengths and weaknesses; Pursues training and development opportunities; Strives to continuously build knowledge and skills; Shares expertise with others.

**Interpersonal Skills** - Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.

**Quality** - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

**Teamwork** – Exhibits objectivity and openness to other's views; gives and welcomes feedback; contributes to building a positive team spirit.

**Visionary Leadership** – Displays passion and optimism; inspires respect and trust; mobilizes others to fulfill the vision; provides vision and inspiration to peers and subordinates.

**Change Management** – Develops workable implementation plans; communicates changes effectively; builds commitment and overcomes resistance; prepares and supports those affected by change; monitors transition and evaluates results.

**Delegation** – Delegates work assignments; sets expectations and monitors delegated activities; provides recognition for results.

**Quality Management** – Looks for ways to improve and promote quality; demonstrates accuracy and thoroughness.

**Planning/Organization** – Prioritizes and plans work activities; uses time effectively.

**Ethics** – Treats people with respect; keeps commitments; inspires the trust of others; works with integrity and ethically; upholds organizations values.

**Judgment** – Displays willingness to make decisions; exhibits sound and accurate judgment; supports and explains reasons for decisions; includes appropriate people in decision-making process; makes timely decisions.

**Safety and Security** – Observes safety and security procedures; determines appropriate action beyond guidelines; reports potentially unsafe conditions; uses equipment and materials properly.

**Adaptability** – Adapts to changes in the work environment; changes approach or method to best fit the situation; able to deal with frequent change, delays, or expected events.

**Attendance/Punctuality** – Is consistently at work on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time.

**Dependability** – Follows instructions, responds to management directions; takes responsibility for own actions; keeps commitments; commits to long hours of work when necessary to reach goals; complete tasks on time or notifies appropriate person with an alternate plan.

**Initiative** – Volunteers readily; undertakes self-development activities; seeks increased responsibilities; takes independent actions and calculated risks; looks for and takes advantage of opportunities; asks for and offers help when needed.

**Professionalism** – Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions follows through on commitments.

**ABOUT:** Jewish Community Services of South Florida (JCS) is the foremost non-profit, human services agency whose mission is to improve the quality of life and self-sufficiency of the Jewish and broader communities throughout South Florida in accordance with Jewish values. Founded in 1920, JCS delivers exemplary social services through compassionate and comprehensive programs that help people stay healthy and productive.

**PERKS:** We are proud to offer a competitive benefits package to all full-time employees, including medical and dental plans. A generous vacation and holiday pay benefit and a 401(k) match is available. Staff receives monthly in-service training and CEU opportunities. This is a one of a kind opportunity for leadership in talent management to contribute to a team of mindful, caring and passionate people at work every day in service to our community!

*JCS is a 501(c)(3) not-for-profit organization and equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, age, religion, sex, sexual orientation, disability, gender identity, gender expression, national origin, or veteran status.*

Status – Full-Time/Non-Exempt

Salary - \$40,000