



Job Description
Customer Service Representative

Reports To: Administrator

Responsibilities: The customer service role of a CBRF shall be at least 21 years of age and exhibit the capacity to professionally respond to the needs of the residents and manage the complexity of the CBRF.

An associate degree or higher from an accredited college in a health care related field, OR At least 2 years' experience working in a health care related field having direct contact with one or more of the client groups identified under s. [DHS 83.02 \(16\)](#) and have successfully completed an dementia assessment training course approved by the department or the department's designee, OR

Someone who is enthusiastic about this industry, completes the required MCP Orientation, CBRF Training, and has a positive demeanor.

This role is primarily responsible for creating a welcoming and collaborative reception area in a positive manner. This role will maintain collaborative communications throughout the facility. Perform clerical, reception, resident communications, and human resource administrative duties as assigned. Receive and greet visitors, route telephone calls, and complete a variety of other administrative tasks as assigned below.

Qualifications/Abilities:

- Minimum of an Administrative Assistant degree required. An equivalent in experience and/ or completion of an Associate Degree in Business Management preferred.
- Prior experience working in office setting in a CBRF preferred; not necessary.
- Possess knowledge of Wisconsin DHS Chapter 83; prior experience with HIPAA rules and regulations preferred.
- Strong ability to demonstrate a professional and courteous manner.
- Prior experience in settings requiring a strong ability to multi-task in a front desk area.
- Prior experience in mastery of a multi-line phone; accurately receive, record and transfer messages.
- Proficient in Microsoft Office; Word, Excel, Outlook.
- Prior experience in General Accounting; experience with QuickBooks preferred.
- Must be willing to work every other weekend shift.

General reception/clerical duties include but are not limited to:

- Answer phones and provide excellent customer service to callers.
- Direct callers to proper personnel or voicemail box.
- Take and relay messages.



- Provide callers with general information; screening calls for appropriate party to transfer to.
- Maintain resident confidentiality HIPAA.
- Allow visitors to enter/exit facility using key fob remote.
- Greet and direct visitors to destination in a pleasant and helpful manner.
- File documents.
- Check mail daily/direct mail/process mail.
- Send and receive faxes; check fax machine for orders and communications.
- Maintain communication with Resident Care Coordinators and other staff via walkie-talkie and/or phone extension.
- Coordinate communications via email, daily facility report, iPod, collaboration site, telephone, memos, USPS, etc.
- Make photocopies.
- Assemble admission packets, marketing materials, and new hire folders.
- Perform daily opening and closing procedure.
- Assist various staff members as tasks arise.
- Assist Coordinators, staff, residents, professional staff, and visitors as necessary.
- Communicate with Resident's families as necessary.
- Communicate with staff as necessary.
- Communicate with social workers as necessary.
- Ensure that all required parties receive proper notifications as necessary.
- Other duties as assigned.

Resident Care Duties included but not limited to:

- Arrange resident appointment transportation
- Retrieve Resident charts upon request.
- Verify and update Resident charts as needed.
- Schedule Resident beauty appointments
- Arrange care conference appointments
- Update 24-hour status sheet
- Update Census sheet
- Other duties as assigned.

Business Office Duties include but not limited to:

- Create outgoing invoices for Resident monthly rent and care services.
- Accounts Receivable/Accounts Payable
- Data entry/Document creation/Document updates
- Update/Compare budget
- Take inventory
- Order office supplies
- Other duties as assigned.



Human Resource assistance duties include but not limited to:

- Enroll employees for training
- Assist in set-up and scheduling of training
- Assist managers with discipline; documentation and recording as directed by Administrator/Coordinators (if needed)
- Update staff attendance
- Update employee phone list (Employee list)
- Update nameplates
- Serve as mediator & liaison between staff, managers, and guests
- Other general duties as required.

Physical Demands: See attached list

This job description is not intended to be all inclusive. The employee will also perform other reasonable related duties as assigned by the supervisor or other manager.

Management reserves the right to change job responsibilities, duties, and hours as needs prevail. This document is for management communication only and not intended to imply a written or implied contract of employment.

This offer is conditional upon the successful completion of criminal history record, evidence of eligibility to work in the United States, caregiver background checks, and meeting MCP's training program within 90 days of employment. This is considered your formal notice. At any time during employment, if any conditions change regarding criminal history background information – employer must be notified immediately.

Caring for residents with Dementia and Alzheimer's can be an extremely challenging and stressful occupation that subjects employees to associated behaviors. By signing this document, you acknowledge your understanding of the industry pressures and inherent stress associated with this position.

I have read the above job description and fully understand its contents. I hereby agree to accept the responsibility as outlined above.

Name

Date



STRENGTH	N	S	O	F	C	Physical Demands
Push/pull light objects under 10 pounds				X		Frequency Code
Push/pull objects less than 20 pounds				X		
Push/pull more than 20 pounds				X		N = Never
Push/pull more than 50 pounds		X				S = Seldom/once or twice a week
Lift/carry light objects				X		
Lift/carry objects less than 20 pounds				X		O = Occasionally/at least once a day
Lift/carry objects more than 20 pounds				X		
Lift/carry objects more than 50 pounds		X				F = Frequently/several times a day
Lift/carry objects more than 100 pounds	X					
MOBILITY						C = Constantly/ongoing throughout the day
Walking				X		
Standing				X		
Squatting				X		Job Title:
Sit for prolonged periods				X		Business Office
Stand for prolonged periods				X		Coordinator
Remain in uncomfortable position for long periods such as bending over tables or beds			X			
Climb stairs	X					
Reach above shoulders				X		
Bend				X		
Kneel				X		
Drive	X					
ENVIRONMENTAL CONDITIONS						
Exposure to blood, body tissue or fluids				X		
Exposure to hazardous waste materials other than blood, body tissues or fluids			X			
Exposure to excessively high temperatures	X					
Exposure to excessively low temperatures	X					
Exposure to sudden fluctuations in temperatures		X				
Exposure to seasonal conditions in outside weather			X			
Exposure to grease or oil	X					
Exposure to toxins, cytotoxins, or poisonous substances		X				
Exposure to dust				X		
Exposure to other hazardous materials such as chemicals			X			
Exposure to bodily injuries				X		
Exposure to loud or unpleasant noises				X		
Exposure to high humidity or wetness			X			
Exposure to electrical hazards	X					
Exposure to burns	X					
Exposure to electro-magnetic radiation	X					



Exposure to mechanical hazards			X		
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