

Job Description/Specification

Identification:	J0471	TFEU/BCTF Joint Salary Committee Decisions
JOB/POSITION TITLE:	ISD Case Assistant	FORMER TITLE/DEPARTMENT: Referral Co-ordinator
DIVISION/DEPARTMENT:	Income Security Division	PAY GRADE: 4
SUPERVISOR'S TITLE:	Supervisor – ISD Support	DATE APPROVED: October 4, 2012

Function and purpose (a)

The Case Assistant functions as part of a team, under the supervision of the Income Security Division Administrative Support Supervisor. The Case Assistant explains Income Security Division (ISD) services and programs to members and external parties. Gathers and analyses information and input from members, in order to determine initial eligibility for services and/or recommendation for inclusion in specific programs. The Case Assistant assists members in understanding application document requirements, and ensures initial case data is entered into electronic case management software program, and maintains completeness of electronic case files for Salary Indemnity Plan claims, Health and Wellness Program participation, and Long-Term Disability withdrawals.

Principal duties and responsibilities (a)

1. Determine initial eligibility for services offered by Income Security Division.
2. Complete first-level screening based on the criteria established to identify potential candidates for Health and Wellness services.
3. Engages in sensitive, health-related telephone conversations with members to encourage participation, and obtain confirmation of member's willingness to participate in Health and Wellness Program as appropriate.
4. Explain ISD's process and services to members and external parties as required and/or refer questions to other ISD staff and /or Federation staff as needed.
5. Ensure that all pre-defined pieces of information or documentation have been collected and are complete before forwarding a potential case to a Case Manager, and if necessary consult with team Health and Wellness Advisor on questionable referrals.
6. Verify, record and track each incoming piece of information, identify items for follow up and set due dates for completion. Record pertinent member or case information in appropriate system; index scanned documents and process or forward as appropriate.

7. Contact members and/or external parties (e.g. SD, Locals, Rehab Consultants, Physicians, WCB, Great West Life staff and Teacher Pension Plan staff, etc.) to validate information received and to request supporting documents as required or additional pieces of pre-defined information not included in original submissions.
8. Follow up on requests for additional information for upcoming and/or missed due dates.
9. Identifies and resolves issues and/or potential issues related to information received for program application purposes. Provides feedback to divisional staff regarding inconsistencies and/or anomalies by forwarding to Case Manager or ISD Admin Support Supervisor for action.
10. Review and route follow-on documentation received for active cases to assigned Case Manager.
11. Process incoming SIP withdrawal forms. When required, explains the ramifications to the member on the practicality of withdrawal.
12. When a member has made the decision to withdraw, provides information to the member who may be eligible to withdraw from SIP and process accordingly.
13. Forward legal requests as directed by Supervisor.
14. Process privacy access requests as directed by Supervisor.
15. Generates correspondence to members and/or external parties as required using pre-defined templates, and/or creates specialized correspondence as required.
16. Participates with the ISD Admin Support Supervisor in the continual evaluation and improvement of processes, procedures, and documentation.
17. Provides back-up to Intake Clerk as required.
18. Other duties as assigned by Supervisor.

JOB REQUIREMENTS

This section sets out the minimum requirements in the areas of EXPERIENCE, EDUCATION, TRAINING, CERTIFICATES AND PHYSICAL DEMANDS necessary to perform the job.

Experience (b)

This position requires three years directly related experience in a claims, rehabilitation or medical environment demonstrating the following:

- ability to follow and apply complex procedures
- ability to explain and clarify complex procedures
- ability to juggle multiple priorities
- ability to maintain detailed computer, administrative and financial records
- proficiency with office computer software packages
- excellent oral and written communication skills (including telephone, interpersonal and listening skills)

Familiarity with and a working understanding of the following:

- The BCTF Salary Indemnity Plan Regulations
- The BCTF Health and Wellness Program
- The BCTF Living with Balance Program
- The BCTF Assistance Society
- The Teachers' Pension Plan
- Health & Welfare Benefit Plans

Education and training (c)

Completion of secondary school (Grade 12).

Up to one year of education in secretarial and office procedures and practices required.

Course work in medical terminology required.

Successful course work (a minimum of one course) in disability management practices or disability claims required.

Licences and certificates (c)

Medical Terminology Certificate required.

Environment (g)

Physical/emotional environment limited to conditions normally associated with office administrative/clerical work such as communication skills, equipment, operating dexterity and scheduling pressures and in addition is frequently affected by the emotions associated in dealing with urgent, very emotional phone calls and requests for assistance from members in crisis.

JOB CHARACTERISTICS

This section is a key component of the Salary Determination process. This section also forms part of the job description and describes some of the conditions under which the work is performed.

Contacts and relationships (d)

Contacts and relationships with divisional and other Federation staff are required to transmit or exchange information, and to explain or clarify information.

Regular contact with teacher members is to provide information, to ensure documents are in compliance with regulations governing services and to encourage participation, when appropriate in the voluntary Health and Wellness program.

External contacts include rehabilitation service providers, and medical practitioners, regulating agencies, school boards and local union offices. Purpose of the contact is to exchange and clarify information, to obtain co-operation or compliance with procedures and policy, and to explain information and requirements.

Information obtained or provided is routinely of a personal or confidential nature where often the teacher is in crisis, and the interview process can be highly emotional. Courtesy, tact, sensitivity, and diplomacy are required when dealing with external contacts, members and/or member representatives.

Machines, equipment and work aids used

Computer terminals and printers, scanners, manuals, policy statement and reference material related to medical and vocational rehabilitation services and claims management, software related to records management and report preparation, telephones, fax machines and photocopiers and documents related to regulations.

Positions supervised (e)

None.

Physical and/or mental effort (f)

This position includes the processing of a volume of work requiring accuracy in accordance with divisional service standards while balancing incoming calls.

Some additional pressures arise from working with physically/mentally ill members often in crisis, and from schedules and deadlines beyond the control of the position.

Working conditions (g)

Exposures to video display screen glare when operating a computer terminal. To preserve the confidentiality of medical files, it is necessary to secure and limit access to the office area.