



## JOB DESCRIPTION

### Job Title: Certified Enrollment Counselor

Reports to: Director of Programs & Policy

Entity: Community Health Initiative of  
Orange County (CHI OC)

FLSA Classification: Non-exempt FT

Supervises Others: No

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#### SUMMARY:

The Certified Enrollment Counselor (CEC) will provide Medi-Cal, and Covered CA outreach, enrollment, retention and utilization services including but not limited to one of the following community sites:

- o South Orange County (Lake Forest, Mission Viejo, San Juan Capistrano, San Clemente etc.).

In addition, the CEC is responsible for generating leads to meet projected enrollment and care coordination goals of state-sponsored and private programs. The CEC also partners with community clinics, schools, parent organizations, private providers, community-based organizations, churches, and other agencies to implement program curriculum to assist and educate the client population.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Provides educational health information and screens prospective and current members for health insurance programs and other expanded services within the community.
- Assists members in accessing/utilizing medical and social services while encouraging prevention and awareness.
- Uses the One-e-App system for care coordination and enrollments.
- Actively encourages and enrolls new members by meeting program standards for application completion of all potential medical and social services; provides timely assessment and processing of applications.
- Acts as a patient advocate for clients requiring assistance with healthcare/provider issues for the purposes of facilitating access to health services and insurance.
- Tracks eligibility and care coordination procedures such as approval, utilization, retention, confirming a medical home, and resource & referral on assisted children.
- Provides follow-up calls, referrals to resources as needed and appointments to support families as they enter the healthcare system.
- Participates in planning discussions and meetings and assists in developing tactical plans to support outreach, enrollment and the School Campaign.
- Prepares and submits weekly productivity reports to Program Coordinator or Program Director.
- Meets all requirements for confidentiality and for management of corporate, finance and personnel information including distribution controls, secure filing and disposal, and records retention and storage.
- Communicates effectively and courteously with all contacts.
- Supports the vision and goals of CHI OC.

## **ADDITIONAL RESPONSIBILITIES:**

- Routinely performs a wide variety of complex office support duties; sets work priorities based on knowledge of various activities and leads times required of support functions.
- Participates in outreach and community events as needed.
- Provides support to other CHI OC management or staff as needed.
- Completes other duties as assigned.

## **EDUCATION AND/OR EXPERIENCE:**

- High school diploma or GED equivalent required.
- Customer service experience required.
- Certified Enrollment Counselor and/or Certified Application Counselor preferred.
- Knowledge and work experience with children's and adult's health insurance programs (Medi-Cal for Adults, Children and Pregnant Women, Healthy Families, Kaiser Child Healthy Plan, Child Health and Disability Prevention Program (CHDP) and California Kids) preferred.
- Knowledge and work experience with social service programs (CalFresh, CaWORKS, WIC) preferred.
- Knowledge and work experience with the formulation and functioning of County and/or community-based organizations preferred.
- Knowledge and work experience of local and state web application systems (CoveredCA and One-e-App) preferred.
- Must be bilingual and able to speak, read and write (English/ Spanish).

## **COMPUTER & EQUIPMENT SKILLS:**

- Has good general knowledge of computer operations; uses a keyboard and calculator proficiently and with a high degree of accuracy.
- Uses Microsoft Office Word and Excel as well as Internet and email programs proficiently.
- Use office equipment (e.g., fax, copier, scanner).

## **PHYSICAL JOB REQUIREMENTS:**

- Sits for extended periods of time at a computer station or work desk. Stands and walks throughout the day.
- Uses hands and fingers to operate computers and office equipment for up to 8 hours or more each day.
- Lifts up to 10 pounds regularly and 25 pounds occasionally.
- Exposed to typical office environment conditions and noise levels.

## **MENTAL AND REASONING REQUIREMENTS:**

- Uses critical thinking skills to create documents and spreadsheets and interpret information furnished in written, oral, diagram, or schedule form.
- Able to set goals based on available information and to plan work in order to meet deadlines. Able to project likely future occurrences based on current or historic data.
- Able to formulate appropriate responses to requests for services and information from internal or external customers.
- Able to understand customer issues, create solutions and communicate those solutions to implement in a timely manner.
- Uses decision-making skills and judgment to work independently to resolve problems; able to identify those situations that require supervision intervention for a solution.
- Able to understand, comply and implement established processes, practices and systems.

- Uses skill and judgment to ensure written or verbal outputs are clear, accurate, grammatical and of appropriate tone.

**OTHER JOB REQUIREMENTS:**

- Maintains professional behavior, dress and appearance at all times.
- Attends meetings and trainings as requested.
- Meets all applicable safety requirements for the position and work environment including prompt injury reporting.
- Organizes workload throughout the day to meet project timelines and deadlines. Minimizes time spent on personal calls and matters. Meets attendance and punctuality requirements; reports time and attendance accurately.
- Assists with other duties as assigned on a regular or occasional basis.
- Successfully completes a background check.
- Travels locally to outreach and enrollment sites; reliable transportation required.
- Drives personal car on business; maintains driving record and personal car insurance in accordance with organization's policies and provides related records periodically.
- May travel by car or air outside the area for one or several days.

**ACKNOWLEDGMENT:**

I, (print name) \_\_\_\_\_ have read and understand the above job description and agree to comply with and be subject to its conditions. I understand that the Organization reserves the right to delegate, remove, expand or change any and all responsibilities listed above and will inform me of any such change. I certify that I am able to perform the job duties as described with or without an accommodation.

**To apply, please send your resume to**  
[Help@chioc.org](mailto:Help@chioc.org)