



POSITION MANAGEMENT GUIDE

<i>Title:</i>	Referral Assistant - Preschool	<i>Division Approval:</i>	1/22/2024
<i>Department:</i>	Preschool	<i>HR Approval:</i>	1/22/2024
<i>Reports to:</i>	Preschool Supervisor	<i>Board Approval:</i>	6/25/2024

SUMMARY OF PURPOSE

This position is responsible for delivering exceptional customer service to families, agencies, and internal staff; the Preschool Referral Assistant is crucial in facilitating the referral and evaluation process for the Preschool Program. The position involves managing scheduling, record-keeping, data tracking, and various administrative tasks. The successful candidate for this role must exhibit strong organizational skills, flexibility, and attention to detail to ensure the efficient operation of the preschool referral process.

ESSENTIAL REQUIREMENTS

- HS Diploma or equivalent required
- Minimum two (2) years of secretarial experience
- Demonstrated proficiency with the Microsoft Office and Google suites
- Must be highly organized and able to prioritize work efficiently to meet deadlines in a work environment with frequent interruptions
- Must possess good communication skills and be highly confidential at all times
- Must be able to work as a team player yet work independently
- Must pay attention to detail and be able to learn new skills and deal with constant change

ESSENTIAL FUNCTIONS

- Receives calls from families for intakes and schedules appointments.
- Begins paperwork process for special education evaluations.
- Completes initial screening for the evaluation process.
- Schedules all evaluations and includes members of the preschool evaluation teams in several testing locations and community settings.
- Initiates clearance of all preschool children and children coming from the infant/toddler program, CONNECT, OCDEL, Children and Youth, and other agencies.
- Maintains the database, including all evaluations for all counties and testing locations, including community settings.
- Communicates all scheduled appointments and evaluation team members to regional secretaries.
- Share information with preschool regional secretaries to process scheduled evaluations.
- Works with interpreters/language services to make calls to families to relay and/or gather needed information.
- Prepares periodic reports as needed for State data collection.

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- Follows up on cancellations and missed appointments and schedules evaluations for last-minute cancellations.
- Maintains and updates preschool student files on Pelican.
- Mails information on preschool services and resources to parents and agencies as requested.
- Receives family information regarding behavioral concerns and emails the appropriate person for behavioral consults.
- Assumes responsibility for working independently, organizing the workload, and meeting deadlines.
- Works cooperatively with other preschool secretaries to meet preschool goals.
- Assists with emergency procedures for the building, including fire drills, building evacuations, etc.
- Attends staff meetings and in-services as required or directed.

DEPARTMENT/ORGANIZATION

- Keeps current with related technology and developments that impact the department and the organization.
- Makes decisions consistent with the LIU vision, mission, and core values. Establishes and maintains effective communication and positive relationships within the LIU and fosters professional development of LIU staff.
- Contributes to the effective team management of all issues and opportunities within the LIU by modeling the qualities of an LIU Team member (being versatile, ethical, transparent, team-oriented, innovative, transformative, and collaborative; valuing each team member; and understanding the importance of customer service).
- Understands organizational development and change principles and applies these principles to promote improvement within the Department.
- Performs other functions as assigned.

SCOPE AND IMPACT

This position works under direction in the performance of the tasks.

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ESSENTIAL PHYSICAL/MENTAL/ENVIRONMENTAL REQUIREMENTS

By checking any of the boxes below, the LIU indicates its reasonable belief that the identified physical/mental/environmental requirements are job-related for this position and consistent with business necessity for the performance of the essential job functions. Notwithstanding, the LIU may not rely solely on these qualifications. Instead, the LIU must consider whether reasonable accommodations enable an otherwise qualified individual to perform the essential job functions.

1. Following Directions

- ☒ Full Understanding of Both Written and Verbal Instructions Required
- ☐ Understanding of Verbal Instructions Only Required
- ☐ Understanding of Written Instructions Only Required

2. Communication - English

- ☒ Excellent Verbal Communication Skills Necessary
- ☐ Basic Verbal Communication Skills Necessary
- ☐ Limited or No Verbal Communication Skills Necessary

3. Functional Reading - English

- ☒ Fluent Reading
- ☐ Recognition of Signs/Symbols
- ☐ Simple Reading
- ☐ No Reading Skills Required

4. Hearing

- ☒ Ability to Hear Required
- ☐ Limited Hearing
- ☐ Hearing Not Required

5. Seeing

- ☒ 20/20 Vision with Corrective Eyewear
- ☐ Limited Vision
- ☐ Vision Not Required

6. Functional Math

- ☐ Complex Computational Skills (Accounting and Financial Skills)
- ☒ Simple Computational Skills (Addition, Subtraction, Multiplication, Division, Percentages)
- ☐ Simple Counting Skills
- ☐ No Mathematical Skills Needed

7. Time

- ☒ Must Tell Time to the Minute
- ☐ Must Recognize Specific Times (Arrival, Departure, Breaks, Lunch)

8. Orientation (Familiarity with Surroundings)

- ☒ Several Blocks From Building
- ☐ Building Only
- ☐ Work Area
- ☐ Room Only

9. Mobility Skills

- ☒ Mobility Within the Building
- ☐ Mobility Within a Four-Block Radius
- ☐ Driving Required

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10. Sitting

- ☒ 75% - 100%
- ☐ 50% - 75%
- ☐ 25% - 50%
- ☐ Less than 25%

11. Standing

- ☐ 75% - 100%
- ☐ 50% - 75%
- ☐ 25% - 50%
- ☒ Less than 25%

12. Bending

- ☒ Knees and Waist
- ☐ Waist Only
- ☐ Knees Only
- ☐ No Bending Required

13. Lifting

- ☐ Greater than 30 lbs.
- ☒ 10 - 30 lbs.
- ☐ Less than 10 lbs.
- ☐ No Lifting Required

14. Reaching

- ☐ Greater than 6 Feet
- ☒ 2 - 6 Feet
- ☐ Less than 2 Feet
- ☐ Reaching Required

The above job description is intended to describe the general nature and level of the work being performed by employees assigned to this job title. This is not an exhaustive or comprehensive list of all duties, tasks, and responsibilities. Employees will be expected to perform duties that do not appear in the job description. Management reserves the right to amend and change responsibilities to meet operational and organizational needs as necessary.

Adopted by LIU Board of Directors: 6/25/2024