



## Enrollment Intake Coord

### JOB PURPOSE

Under the direction and supervision of the Enrollment & Outreach Manager, the Enrollment Intake Coordinator is responsible for converting eligible telephone inquiry calls for On Lok PACE to meetings with Enrollment and Outreach Representatives

### ROLES AND RESPONSIBILITIES

	Essential Function
• Develops and maintains relationships with new callers and email inquiries who inquire about On Lok PACE in order to secure a face-to-face meeting with an Enrollment & Outreach Representative	X
• Assisting with auditing dashboards and call reports.	X
• Attends and participates in team meetings.	X
• Develop and maintain relationships with existing members and key stakeholders in the community, and generates referrals to help bring in new members to meet or exceed monthly enrollment targets.	X
• Participate in community outreach events and meetings to generate referrals.	X
• Develop and execute enrollment strategies for new target markets.	X
• Coordinate and schedule with operations staff for efficient and friendly enrollment process.	X
• Coordinate and participate in all aspects of the enrollment assessment process as needed to assure timely enrollment.	X
• Complete all data collection and mandated paperwork throughout the enrollment process within designated timeframes.	X
• Maintain up to date data base information on all enrollment and outreach efforts	X
• Consistently meet all minimum standards as outlined in On Lok Policy and Procedure.	X
• Calls eligible referrals from Customer Relationship Management) (CRM) database to engage candidates to face-to-face meeting with an Enrollment & Outreach Representative.	X
• Makes calls to database to candidates who have not had recent contact for the purpose of engaging them in the enrollment process.	
• When available, assists with calling or receiving calls from candidates in the enrollment process to confirm, set up, or reschedule appointments.	
• Responds to candidates who requests information via email when needed.	
• All other duties as assigned.	

Supervisory Responsibility

# Direct Resources  
Managed

# Indirect Resources  
Managed

### Core Values

*Every member of our community must demonstrate and promote a commitment to On Lok's core values and the On Lok Healthcare Hospitality G.R.E.A.T. Practices for 5-Star customer service.*

#### **Compassion**

We care for each other, our partners and the people we serve. We act with empathy, kindness and a desire to help.

The above statements are intended to describe the general nature of work performed. They are not considered as an exhaustive list of all job tasks performed. On Lok reserves the right to change job descriptions, work hours or work sites as required by the program.

## Core Values

*Every member of our community must demonstrate and promote a commitment to On Lok's core values and the On Lok Healthcare Hospitality G.R.E.A.T. Practices for 5-Star customer service.*

### **Excellence**

We set high standards and we strive to be the best we can be in everything we do. This takes integrity, quality, innovation, collaboration, skills and learning.

### **Resourcefulness**

We steward resources in an effective and responsible way. We think creatively to solve problems and innovate.

### **Inclusivity**

We create an environment of collaboration and respect the voices, experiences and interests of diverse cultures and society groups. Sense of belonging and dignity are experienced by all.

### **Healthcare Hospitality G.R.E.A.T. Practices for 5-Star Customer Service**

G - Greet  
R - Respect  
E - Experience  
A - Assist  
T - Thank

## REQUIRED QUALIFICATIONS

### Education

#### Education Level

Bachelor's Degree

#### Education Details

Marketing, Sales, Communication, Public Relations, or related degree

### Work Experience

#### Experience

2-4 years

#### Experience Details

complex, long sales cycle experience, including selling over the phone or face to face meetings, preferably with diverse populations

### Knowledge, Skills and Abilities

#### KSAs

- Track record of setting, achieving goals and closing multiple accounts per month.
- Excellent interpersonal, written and verbal communication skills. Must be detail oriented with excellent time management skills. Ability to multi-task and work independently.
- Must be proactive, positive, driven self-starter who strives for results while demonstrating superior organizational and follow-up skills.
- Demonstrates good judgment, resourcefulness, flexibility and problem solving to achieve desired results
- Proficiency with MS Office (Word, Excel, and PowerPoint) required.
- Valid CA Driver's license in good standing with personal automobile and insurance. Ability to travel to other sites and locations for meetings and presentations. Ability to work non-standard hours when needed.
- May require bilingual ability.

### Licenses and Certifications

#### Enter Licenses/Certifications

#### Licenses/Certification Details

#### Time Frame

CA driver License

Upon Hire

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## FUNCTIONAL REQUIREMENTS AND WORKING CONDITIONS

*The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions*

Environment Type

Admin Office

### Physical and Mental Requirements

- While performing the duties of this job, the employee is regularly required to stand or sit for long periods of time; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee occasionally is required to climb and stoop, kneel, crouch, or crawl.
- Specific vision abilities required by this job include close vision, and ability to adjust focus.

### Working Environment

- This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.