

## Role Description

Title: 2-1-1 Health Care Navigator  
Responsible to: 211 Center Manager  
Revised Date: February, 2015

---

All the criteria-based duties and standards within this document will be performed according to established policies, procedures, and guidelines within PPUW.

## Role Summary

The 211 Health Care Navigator supports the United Way 2-1-1 in achieving department and organizational goals—assuring all work assignments, tasks and projects are completed accurately and on time. In collaboration with internal and external stakeholders, this employee is responsible for caller/client response to medical and health care needs, problem assessment, appropriate information and referral and follow-up to see if needs were met. Provides advocacy, when necessary, by contacting potential resources to facilitate service delivery and is responsible for health-related information and maintenance of information in database.

The Health Care Navigator assures that he or she is compliant according to organizational and legal policies, procedures and standards.

---

## Primary Role Responsibilities

- 1. Vision and Goal Alignment.** This employee embraces the PPUW business model and key strategies that enable PPUW to achieve its vision and mission. This employee prioritizes his or her work to ensure he or she accomplishes what matters most in achieving his or her individual goals in the context of his or her department's goals.
- 2. Building relationships.** The Health Care Navigator builds highly effective relationships with stakeholders of PPUW, including his or her supervisor, peers, community members, volunteers, grantees and others. This employee approaches all relationships in a positive and collaborative manner, and is aware that his or her actions are reflective of the PPUW and is thus committed to creating a consistent and positive image inside the organization and in the community. In addition, this person consistently maintains a professional appearance.

3. **Functional responsibilities:** The employee in this role has the following top four major duties and responsibilities:
- **Function:** Provides specialized caller/client problem assessment, information and referral and follow-up appropriate to the client's needs, providing advocacy when necessary.
  - **Function:** Maintains accurate documentation of caller/client demographics and services referred to in order to track available resources or see if resources are exhausted.
  - **Function:** Actively researches new health related programs and services and adds them to IRIS database as well as is responsible for many health related and voluntary health organization resources.
  - **Function:** Actively involved in outreach duties such as attending health and resource fairs and meeting the public. Serve on many coalitions to network with community stakeholders.
4. **Performance.** The Health Care Navigator participates in developing and accomplishing annual and ongoing goals—particularly as related to the United Way 2-1-1 function. He or she reviews these goals on a routine basis with his or her leader to assure work is being carried out according to expectations, deadlines, and accuracy. This employee accepts constructive feedback and seeks learning opportunities to bridge any performance gaps or to prepare for increased responsibilities or future growth/promotions. In addition, this employee seeks opportunities to improve department outcomes by identifying barriers and possible solutions.
5. **Innovation and Change.** This employee may participate on projects, teams or committees to help advance current or new initiatives being undertaken within PPUW.
6. **Other.** This is a new role in the 2-1-1 call center therefore this first year we will work to evolve this position in a year's time.

1. **EDUCATION.** The ideal incumbent will have a Bachelor's degree in behavioral sciences or related field like having a BSW or MSW.
2. **EXPERIENCE.** The ideal incumbent offers a minimum of three years experience, with some experience in a non-profit organization preferred. In addition, needs to have basic database and Microsoft Office skills.
3. **ESSENTIAL TECHNICAL/MOTOR SKILLS:** The ideal incumbent will possess a set of skills including, but not limited to conflict resolution, change management, process improvement, innovation and awareness of the need to carefully manage scarce resources.
4. **INTERPERSONAL SKILLS:** The ideal incumbent demonstrates the following competencies—depending upon level of experience and seasoning:
  - **Character:** This employee follows the standards of behavior; displays honesty and integrity in every action and decision; is driven to achieve; is reflective and seeks authentic feedback; and is known as a continuous learner.
  - **Team Skills:** This employee is a good listener; is cooperative and participative; is respectful in all interactions; builds trusting relationships with others; understand the impact of his or her actions on others; and manages conflict effectively.
  - **Functional Skills:** This employee follows organizational policies and standards; has effective technology skills; seeks to understand the UWGKC business model and key messages; adopts best practices; and aligns personal work to assure effective outcomes.
  - **Interpersonal Skills:** This employee is considerate of others; has effective verbal and written skills; responds to requests in a timely manner; is a proactive problem solver; understands the interconnectivity of organizational work; and practices a consultative approach in interactions with others internally and externally.
  - **Leading Change:** This employee avoids second-guessing organization decisions; is open and receptive to new ideas and approaches; frames questions and concerns in a positive manner; offers innovative ideas or solutions; and influences or inspires his or her colleagues.
5. **ESSENTIAL PHYSICAL REQUIREMENTS:** Moving, walking, balancing, kneeling, crouching, stooping, reaching, standing, pushing, pulling, and lifting.
6. **ESSENTIAL MENTAL ABILITIES:** The incumbent will possess a set of skills including, but not limited to explaining, adapting, comprehending, organizational skills, time management, conflict resolution, listening skills, and the flexibility to meet the changing needs of the organization.

Role Title: Health Care Navigator

---

7. **ESSENTIAL SENSORY REQUIREMENTS:** Visual and hearing skills.
8. **EXPOSURE TO HAZARDS:** Limited exposure.

How to Apply: Please email cover letters, and resumes to [hr@ppunitedway.org](mailto:hr@ppunitedway.org)