



Intake and Assessment Coordinator Job Description

Location(s):	Charlie Naylor Campus – 2803 Mossrock, San Antonio, TX 78230
Reports to:	Chief Operations Officer, COO
Classification:	Full-Time / Exempt Salaried

Position Overview

The Intake and Assessment Specialist will serve as the first point of contact for individuals and families seeking support in their recovery journey through our services. The intake and assessment coordinator will perform intake for new participants that includes screening and assessments to determine eligibility for services and initiate recovery and treatment plans. This role requires strong clinical knowledge, communication skills, and the ability to assess and triage a wide range of mental health and substance use concerns.

The Intake and Assessment Specialist must actively support and demonstrate behavior consistent with Rise Recovery core values – Community, Outstanding Service, Relationship, and Empowerment – while providing enthusiastic, professional and courteous service to all who walk through our doors.

Essential Job Functions

Intake and Assessment

- Gather detailed information about clients' presenting concerns, including mental health and substance use history, medical conditions, social dynamics, and life stressors.
- Accurately record all relevant client information, assessment results, and treatment plan details in the electronic health records (EHR) system.
- Communicate and collaborate with clinicians, case managers, and referral sources to ensure smooth transitions into treatment and appropriate care.
- Assess whether clients meet the criteria for treatment based on their needs, the facility's capabilities, and insurance coverage.
- Provide information on available services to help clients make informed decisions about their care.
- Conduct comprehensive intake interviews to gather client history, including substance use, mental health concerns, medical conditions, social support, and other relevant factors.
- Determine client eligibility for services based on clinical needs, program capabilities, and insurance coverage.
- Develop initial recovery and treatment plans, setting clear goals, treatment modalities, session frequency, and referrals to appropriate services.
- Provide education to clients and families on available recovery and treatment options, program expectations, and the recovery process.
- Maintain accurate and timely documentation in the Electronic Health Records (EHR) system, ensuring compliance with State, Federal and accreditor requirements. Track and report client intake data, including admission rates, treatment engagement, and program outcomes.
- Assist in the development and implementation of intake policies and procedures to improve efficiency and client experience.



- Ensure all paperwork is completed within required timelines, including funding agency reports and internal compliance documentation.
- Coordinate with billing and administrative staff to verify insurance benefits and secure necessary authorizations for treatment.

Education and Training

- A Bachelor's degree in Psychology, Social Work, or a related field
- Licensed as LCDC, LCSW, LPC in the state of Texas.
- Must maintain compliance with continuing education and licensing requirements set forth by the Texas Department of State Health Services (DSHS) and other applicable entities.

Knowledge and Experience

Required

- Extensive experience with chemical dependency treatment in the state of Texas
- Minimum of five (5) years of experience in substance use disorder treatment or related behavioral health services
- Knowledge of Texas state regulations, ASAM criteria, DSM-5 substance use disorder classifications, and evidence-based treatment approaches.
- Strong crisis intervention skills, with the ability to assess and respond to suicidal ideation, overdose risks, and severe withdrawal symptoms.
- Knowledge of all applicable rules and regulations pertaining to substance use disorder counseling and treatment and/or peer recovery models.
- Current State of Texas Driver License with at least Liability Insurance coverage.
- Applicants must have a valid Texas driver license, a minimum of six (6) years of driving experience, a clean driving record, and must be twenty-three (23) years of age or older to comply with Rise Recovery's insurance requirements.
- Interpersonal skills, organizing ability, problem solving, accuracy, follow through, time management and attention to detail.

Preferred

- Personal or family experience with long-term recovery

Physical Requirements

- Must be able to meet the physical requirements to include lifting up to 12 lbs. and supporting up to 55 lbs.; bending, stooping, and getting on and off the floor without assistance.
- Ability to participate in outdoor activities with participants.
- Ability to travel to meetings and other sites.
- Able to operate standard office technology, equipment and utilize office supplies.

Working Conditions

- Standard administrative office environment.



- Regularly scheduled hours may vary during periods of workload fluctuation.
- Occasional night, weekend and holiday hours will be necessary to support additional recovery programming and/or Rise Recovery events.

I have reviewed and understand the requirements of my position with Rise Recovery.

Signature

Date

Printed Name