

**CHARLOTTE AREA FUND, INC.**  
**JOB DESCRIPTION**

**TITLE:** Secretary/Receptionist

**EFFECTIVE:** August 5, 2010 (Revised 07-2014)

**GRADE:** II

**REPORTS TO:** SS Intake/Quality Assurance Coordinator **FLSA Status:** Non-Exempt

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**RESPONSIBILITY:**

Provide clerical and general office support to facilitate CAF's day-to-day operations. Conduct pre-assessment of applicants as preparation for the intake/eligibility determination process.

**DUTIES:**

- General receptionist duties that include answering telephone, forwarding calls to appropriate personnel, recording and disseminating messages, providing general information about agency programs and services. Furnish other accurate referral information as requested and authorized. Respond to basic inquiries concerning agency programs and schedules (intake process, classes, workshops, etc.). Maintain waiting area and designated office space in an appropriate manner to receive visitors.
  - Greet the public in a professional manner by providing information as appropriate, i.e. criteria for receipt of agency services, accurate referrals, etc.; directing/escorting individuals to designated areas.
  - Assist in coordinating services, per procedures, for the Care 3 Site by directing users accordingly.
  - General clerical responsibilities that include creation of correspondence, copying, and performance of data entry in agency approved computer programs. Responsible for other clerical support as requested by staff. Report copier usage monthly per agency procedures.
  - Create and maintain updated agency forms.
  - Maintain client files per agency established system and procedures. Remove client folders from file cabinets prior to directing client to appropriate staff. Re-file folders after completion by staff.
  - Responsible for preparing applicants for the intake process by reviewing and copying documents for eligibility determination, entering information in agency computerized system. Assist applicants with retrieval of required documentation for eligibility determination.
  - Prepare, collect and post out-going mail. Maintain a postage log and provide monthly postage report to accounting at the end of each month. Retrieve agency mail from post office and transport out-going mail to the post office each day.
  - Open and secure office building each day.
  - Perform other duties as assigned.
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**PRE-EMPLOYMENT QUALIFICATIONS:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or

ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION and/or EXPERIENCE**

- High School Diploma with at least 2-3 years secretarial experience; Associate's Degree in Secretarial Science preferred
- At least 2-3 years related experience conducting assessment and eligibility determination.
- Demonstrated knowledge of programs available for low-income in Mecklenburg County.
- Demonstrated knowledge and proficient use of MS Office Software Applications, especially Excel, WORD and INTERNET, and demonstrated data entry ability. Ability to learn and use other software applications applicable to the position.
- Demonstrated Customer Service Skills.
- General knowledge of office processes, with high organizational and telephone/verbal communication skills and experience with computers, data entry and file management.

**OTHER SKILLS AND ABILITIES**

- Ability to operate office equipment that includes desktop computer, printer, calculator, copier, fax machine, multi-key telephone system, scanner, etc.
- Ability to type at least 45 words per minute.
- Ability to calculate figures and amounts such as discounts, interest, averages and proportions, percentages, area circumference, and volume. Ability to apply concepts of basic algebra.

**REASONING ABILITY**

- Ability to multi-task and solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**LANGUAGE SKILLS**

- Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures and government regulations.
- Ability to effectively present information and respond to questions from employees, clients, customers, and the general public.
- Demonstrated ability to compose correspondence, write reports and create informative literature regarding programs.
- Bilingual (English and Spanish) skills for effective communication with diverse populations.

**CERTIFICATES, LICENSES, REGISTRATIONS**

- Valid Driver's License, Proof of Auto Insurance and Reliable Transportation that may be used in the performance of duties.

**PHYSICAL DEMANDS**

- 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.

- While performing the duties of this job, the employee is regularly required to walk, stand, crawl, bend, stoop, climb, use hands to finger, handle, or feel; and reach with hands and arms, hear. The employee frequently is required to sit and talk. The employee may occasionally lift and/or move up to 40 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, and depth perception.

**WORK ENVIRONMENT**

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is occasionally exposed to outside weather conditions. The noise level in the work environment is usually low to moderate.

**SPECIFICATION**

- The information presented indicates the general nature and level of work expected of employees in this classification. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities, qualifications, and objectives required of employees assigned to this job.