



## CHARLOTTE AREA FUND EMPLOYEE JOB DESCRIPTION

### Intake & Front Office Specialist

**Reports To:** Program Director

**FLSA Status:** Non-exempt

**SUMMARY:** The Intake & Front Office Specialist provides intake, assessment and eligibility determination services to applicants of the various Charlotte Area Fund programs. This position is responsible for conducting pre-evaluation and post placement follow-up as well as formal job readiness training off-site at other facilities. The Intake & Front Office Specialist provides general office support for the day-to-day operations of Charlotte Area Fund and serves as the first point of contact for most individuals.

#### **DUTIES AND RESPONSIBILITIES:**

- Refers customers and/or visitors to other service agencies, as well as the CAF Self Sufficiency/Senior Assistance Project with regards to employment, consumer education, budgeting, and computer training as appropriate. Follows up with referrals to other agencies and act as advocate for clients in obtaining needed services.
- Recruits applicants, conducts intake and needs assessment services on and off-site including initial client interview, completion of all certification forms and other documents, verification of income, and follow-up in determining applicant's eligibility status for agency services.
- Enrolls clients in the CAF Self Sufficiency Project with regards to employment, consumer education, and nutrition program components as appropriate. Refers clients to other service agencies as needed. Follows up on referrals to other agencies and act as advocate for clients in obtaining needed services.
- Creates files for pending applicants and clients that include complete and accurate records on applicants/clients' eligibility status and assessment results; ensures accurate and timely data entry relevant to applicant/clients' records and files is ongoing.
- Provides formal job readiness training off-site, performing counseling and other activities as outlined in the work program and needed by individual clients.
- Follows up with clients placed in job opportunities through the Self Sufficiency Project to determine current placement and advancement data at intervals set by the programs and records appropriately.
- Provides the SS Intake/Quality Assurance Coordinator with appropriate statistics for weekly, monthly, quarterly and annual reports.
- Performs general office duties including answering and directing calls to the appropriate party, greeting visitors/guests, preparing correspondences, sorting and posting mail, filing, data entry of program information, and orders supplies as needed.
- Prepares monthly reports for the organization, including Postage Machine, Sign-In Kiosk, Copy Machine and Snap-site reports.
- Maintains a welcoming and professional waiting area and office space for all customers, including the vending machines.
- Performs notary duties for staff and customers.
- Disburses purchase orders to the appropriate departments.
- Attends staff meetings and training sessions provided for both program and general purposes.
- Performs all other duties as assigned.

## 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:** Associate degree in Case Management, Human Services or similar required, with three (3) or more years' experience with a non-profit or educational institution that provides similar training is required; or Bachelor's degree in Human Services with one (1) year experience.
- **Language Skills:** Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to effectively present information to management, public groups, and/or board of directors. Ability to interact clearly and effectively, in both written and oral communication, with supervisor, clients, staff, vendors, etc.
- **Computer Skills:** To perform this job successfully, an individual should be proficient in personal computer skills including electronic mail, record keeping, routine database activity, word processing, spreadsheet, graphics, etc. This role requires an average knowledge of Microsoft Office.
- **Other Qualifications:** Valid driver's license, proof of insurance and reliable transportation to perform job duties are required.

## COMPETENCIES:

- **Communication:** Informs orally and in writing, with clarity and good effect. Understands clearly and quickly when instructions or orders are received. Judges what information is important and what is not, and what should be communicated, how, to whom and when.
- **Compassion:** Genuinely cares about people. Is concerned about their work and non-work problems. Is available and ready to help. Is sympathetic to the plight of others not as fortunate. Demonstrates real empathy with the joys and pains of others.
- **Interpersonal Skills:** Relates well to all kinds of people, up, down, and sideways, inside and outside the organization, builds appropriate rapport, builds constructive and effective relationships, uses diplomacy and tact, can diffuse even high-tension situations comfortably.
- **Time Management:** Uses time effectively and efficiently. Values time. Concentrates efforts on the more important priorities. Gets more done in less time than others. Can attend to a broader range of activities.
- **Judgment:** Makes decisions in a timely fashion that are sound, accurate and supported by the reasoning and inclusion of appropriate people.

## PHYSICAL DEMANDS:

While performing the duties of this job, the individual must be able to remain in a stationary position for at least 80 percent of the time while operating their computer and performing office work. The individual needs to be able to move about inside the office, the community and other necessary areas. The individual needs to be able to travel from one location to another and transporting items/equipment and others. They constantly operate a computer and other office productivity machinery, such as a calculator, copy machine, fax machine, and computer printer. They must be able to exchange accurate information with customers and others in the office while interacting. The employee must regularly lift and /or move up to 25 pounds, occasionally lift and/or move up to 50 pounds. The individual must be capable of reviewing their work for errors and make adjustments as necessary.

**WORK ENVIRONMENT:**

While performing the duties of this Job, the individual is occasionally exposed to moving mechanical parts. The noise level in the work environment is usually low to moderate. The individual frequently works in a controlled climate.