

# **SUPPORTS TO ENCOURAGE LOW-INCOME FAMILIES (SELF) POSITION DESCRIPTION**

**Job Title:** Intake Specialist  
**Reports To:** HEAP Coordinator  
**Classification:** Non-Exempt/Full Time Temporary  
**Approved By:** Bev Wright  
**Date:** September 2013

## **SUMMARY**

Under the supervision of the HEAP Coordinator, the Intake Specialist conducts client interviews, obtains required documentation to determine eligibility, maintains client files and completes computer data entry to assure timely eligibility determination and prompt vendor payment.

## **JOB SPECIFICATIONS**

**Knowledge of:** General office skills and computer skills, including Internet, Outlook, Word, Excel and other current software as assigned.

### **Ability to:**

- Be sensitive to the support needs of low-income and diverse populations
- Provide excellent customer service, sometimes under high-pressure situations

### **Skills/Experience/Education:**

- Minimum of one year in a customer service and/or direct social service environment
- Must possess good written and verbal communication skills
- High School Diploma or GED

### **Licensure or Certification Requirements:**

- Must have a valid driver's license, insurance, and dependable transportation. Occasional home visits and/or rotation to satellite offices may be required.
- Must attend training sessions, meetings and/or webinars associated with the HEAP program.

## **SUPERVISORY RESPONSIBILITIES**

This position has no supervisory responsibilities.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Performs comprehensive intake, documentation verification and review and eligibility determination for clients applying for energy assistance programs.
- Contacts vendors to verify account details and make payment pledges and other arrangements based on program guidelines.
- Maintains client files, both paper and electronic data entry. Includes processing incomplete files and handling file reviews and corrections, as needed.
- Duties may include home visits and rotation to satellite offices as needed.

- Provide basic client referrals to United Way 211 helpline and other SELF programs as needed.
- Other duties as assigned.

**All employees of SELF are expected to demonstrate competency in the following:**

**Teamwork & Flexibility:** Employees are expected to demonstrate a willingness to make sure goals, tasks and assignments are met; put the agency goals ahead of self-interest; reduce conflict and establish positive working relationships; adapt to changing priorities.

**Interactions:** Employees are expected to communicate effectively with other agency staff and other community partners; show understanding and interest in assisting others; exhibit expected level of respect and sensitivity to others' views; respond and follow-up in a timely, professional manner.

**Customer Service:** Employees are expected to communicate effectively with consumers/clients; show understanding and interest in meeting needs and expectations; exhibit the highest level of respect and sensitivity; respond and follow-up consistently in a timely, professional manner.

**Initiative:** Employees are expected to accept responsibility for tasks and assignments; demonstrate effective problem solving with routing supervisory involvement; meet required standards by showing willingness to take on or participate in tasks or activities outside the normal scope of the job.

**Dependability:** Employees are expected to be available for normal working hours as assigned, with minimal or no unscheduled absenteeism, lateness with respect to reporting to work and/or returning from lunch or breaks.

**I have read and received a copy of this job description and agree to perform the responsibilities as described above. I understand that my job duties may change at any time with the approval of my supervisor or the executive director. I also understand that signature of this document does not constitute an employment contract of any kind.**

\_\_\_\_\_  
Employee Name (please print)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

**Equal Opportunity Employer/Services Provider M/F/D/V**