



# WALDO COMMUNITY ACTION PARTNERS JOB DESCRIPTION

## POSITION SUMMARY

The **LIHEAP Client Services Intake Specialist** performs intake and receptionist duties for the Outreach/Referral Office. Answers the telephone, sets up appointments, meets and greets visitors, assists with application intake process, collects accurate data and information, and makes appropriate referrals to other services and programs.

## ESSENTIAL DUTIES AND RESPONSIBILITIES

### Program Administration

1. Answers the telephone, and sets up appointments for various sites and times for application intake.
2. Assists with the client application process.
3. Makes appropriate referrals to other programs.
4. Maintains files, and performs coding, filing, etc.
5. Assists with voucher to clients and vendors.
6. Completes light housekeeping duties.
7. Meets with clients in their homes.
8. Provides clerical support to all program staff.

### Professional Development

1. Keeps up to date on State and Federal regulations governing all aspects relevant to this position.
2. Participates in any required trainings, meetings and professional development activities.

### Leadership & Teamwork

1. Collaborates with all partner agencies to assure effective communication processes across agencies.
2. Adheres to the policies in the use of computer technology and all tele-communication devices.

### Safety and Wellness

1. Actively promotes safety and accident prevention within the workplace.
2. Reports any unsafe conditions, incidents and/or accidents immediately.

### Non-Essential Duties and Responsibilities:

1. Performs additional duties as assigned.

## GENERAL EXPECTATIONS

- Be committed to the Agency's Mission, Vision and Values.
- Maintain adequate knowledge of all WCAP programs in order to make referrals to other programs beneficial to the client, his/her family or friends.
- Maintain professional boundaries with all current, past, and prospective clients.
- Maintain confidentiality of clients, staff, and internal business information.
- Present professional and positive image as a representative of WCAP.
- Follow established policies and procedures and comply with all safety requirements.
- Communicate proactively with the supervisor regarding work flow, problems, suggestions, etc.
- Seek out and attend relevant professional development conferences, seminars, workshops, and other activities related to all aspects of this position. Participate in all Pre-Service and In-Service

### Position Title:

LIHEAP Client Services  
Intake Specialist

### Department:

Energy Services

### Reports To:

Energy Services  
Coordinator

### Supervises:

N/A

### FLSA Status:

Non-Exempt

### Salary Range:

RH1/L1

### Last Revised/Approved:

October 2018

training and professional development activities as required by the position. Participate in other local and state level meetings related to all aspects of this position.

- Attend team and staff meetings as scheduled.
- Contribute to a positive, team-oriented work environment.
- Be punctual for scheduled work and use time appropriately.
- Perform required amount of work in a timely fashion with a minimum of errors. Meet deadlines.

## PHYSICAL REQUIREMENTS

*The physical requirements described here are representative of those that must be met by the Incumbent 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 required to stand, and sit for prolonged periods of time; walk; use hands to finger, handle, or feel, including operation of a standard computer keyboard; reach with hands and arms and talk, see and hear; bend and reach; lift and carry up to 10 pounds regularly, and up to 35 pounds occasionally. Specific vision abilities required by the job include close vision, distance vision, and the ability to adjust focus.

## WORK ENVIRONMENT

*The work environment characteristics described here are representative of those the incumbent encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Work is performed in a business office setting and in client homes, which may be in a variety of conditions. Noise level ranges from quiet to moderate. Assigned work may require travel within the local or neighboring communities. This position is a full-time hourly position that typically works normal daytime schedule. However, evening and week end time may be required to meet program and/or organizational needs. Overtime may also be required to meet program and/or organizational needs and requires prior approval.

## QUALIFICATIONS NEEDED FOR POSITION

### Experience and Skill Requirements:

The following experience and skills are considered essential:

- At least one year of prior office and/or data entry experience required.
- Ability to interpret rules and regulations.
- Strong written, verbal communication skills& listening skills.
- Strong time management and organizational skills.
- Proficient skills in Microsoft Word, Excel and Outlook.

### Education Requirements:

The following education requirements are considered essential:

- High School Diploma or equivalent.
- Must have adequate transportation, a valid driver's license and meet and maintain WCAP's insurance requirements.
- Ability to meet and maintain WCAP background clearance requirements.

**\*\* All requirements and skills are considered to be essential, unless otherwise indicated**

*External and internal applicants, as well as position incumbents who become disabled as defined under the Americans With Disabilities Act, must be able to perform the essential job functions (as listed) either unaided or with the assistance of a reasonable accommodation to be determined by management on a case by case basis.*

*The job description does not constitute an employment agreement between the employer and the employee and is subject to change by the employer as the needs of the employer and requirements of the job change.*

I have read and understand the above description, and I am confident that I will be able to meet the requirements of this job.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date