

**FRANKLIN-VANCE-WARREN OPPORTUNITY, INC.**  
**PROFESSIONAL STAFF POSITION DESCRIPTION**

**Client Intake and Eligibility Specialist**

**Position Title:** Client Intake and Eligibility Specialist

**Classification:** Exempt

**Salary Grade/Level:** Grade 2B

**Department:** Weatherization

**Reports to Position:** Weatherization Director

**General Summary of the position:**

The Intake Specialist will assist clients

**Essential Functions:**

1. Properly Greet clients as they come into the office.
2. Referral of clients based on a holistic assessment of needs and available agency programs.
3. Grant Access to the building based on client need and availability of appropriate staff.
4. Maintains organized, accurate, and updated client records and files.
5. Provide client referrals to outside Agencies as appropriate.
6. Answer telephone, transfer calls and relay messages to appropriate staff.
7. Keep and maintain daily an accurate tracking sheet of clients and services needed.
8. Performs other responsibilities and duties as assigned.

**Knowledge, Skills and Abilities:**

1. Computer Skills (Microsoft, Excel and Publisher)
2. Ability to manage multi-lined telephone system.
3. Superior Customer Service and Interpersonal skills.
4. Excellent Organizational skills.
5. Ability to effectively present information to management and participants.
6. Basic knowledge of all current agency program participation requirements.

**Education, Training and Experience:**

1. High School diploma or equivalent.
2. Two (2) years customer service experience

**Physical Requirements:**

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. While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms.

**Working Environment:**

This job operates in a professional office environment and in a variety of housing environments. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

**Other Requirements:**

Must have a valid state driver's license and be able to travel.