

## INTAKE SPECIALIST



**Job Title: Intake Specialist**

**Reports to: Managing Attorney**

**Effective Date: 3.8.2021**

### **JOB SUMMARY:**

Intake Specialists are responsible for completion of program intakes and redirection of callers to appropriate resources. The conduct of an Intake Specialist and the manner in which the duties are executed shall at all times be consistent with program policies established by the NLS Board of Directors and the NLS Executive Director, including the obligation to maintain client confidentiality.

### **DUTIES/RESPONSIBILITIES:**

- Entry of and closing of intakes in the case management system;
- Respond to all messages (telephone or via on-line intake) are responded to on a daily basis;
- Open and close intakes and assembling office files, forms, and statistics
- Prepare and send Reduced Fee Certificates
- Maintain the intake areas in good order and ensure that the intake units are properly supplied;
- Issue and monitor pro bono case referrals;
- Create and track referrals to other resources for each individual referred.
- Perform all duties in a courteous manner and with attention to detail;
- Perform other tasks as needed and as directed by the appropriate supervisory personnel (tasks may vary from office to office);
- Act as receptionist or secretary as required or assigned;
- Participate upon request, in efforts to advance the organization and in fundraising initiatives

### **REQUIRED SKILLS/ABILITIES:**

- Computer/keyboarding skills, including proficiency in Microsoft Office, Outlook, SharePoint,
- Ability to learn and effectively navigate NLS's case management system;
- Excellent telephone skills, including the ability to deal with and handle difficult callers;
- Prior customer service experience is a plus;
- Proficient in spelling, punctuation, grammar and other English language skills;
- Proven experience of producing correspondence and documents;
- Proven experience in managing information and communication

### **EDUCATION AND EXPERIENCE**

- High School Diploma or equivalent
- Customer service experience
- Associate Degree or minimum of one-year certificate from college or technical school preferred.

### **PHYSICAL REQUIREMENTS:**

Prolonged periods of sitting at a desk and working on a computer.  
Must be able to lift up to 15 pounds at times.