



Improving Lives Through Financial Education and Coaching

Job Title: RPP Assistant

FLSA Status: Non-Exempt

Supervisor: Rep Payee Program Director

Direct Reports: NA

Minimum Qualifications: Two years administrative support experience. Proficient in Microsoft Office, including MS Publisher, Excel, Word, Outlook. Excellent grammar, typing, telephone, communication and listening, problem solving and organization skills; ability to work independently, but team oriented; commitment to clients, agency, and the community.

Preferred Qualifications: Associates or Bachelor's Degree in related field with two years satisfactory work experience in office management or related field.

Primary Role: Perform a wide variety of services related to the needs of the Rep Payee Program to include receptionist duties, customer service, intake coordination, check processing for mailing, and check-pickup log.

Responsibilities:

Receptionist/Administrative

- Provide receptionist and customer service duties including, but not limited to answering telephone as primary phone contact, taking messages, telephone and walk-in intakes (per intake procedure); scheduling client appointments, written or phone follow up for no shows on first-time appointments; mailings; copy correspondence, filing, etc;
- Greet clients/visitors; receipts fee for first-time visits. Ensure that client appointments are on schedule by notifying counselor of client/visitor arrivals;
- Keep up with the physical location of staff so the phone calls and clients can be handled properly; maintain awareness of the presence or location of staff members;
- Maintain and verify agency client appointments, ensuring that records of client sessions are up-to-date on appointment scheduler;
- Provide clients, potential clients and others with relevant information and answers to questions as pertains to the position;
- Assist as needed to maintain postage meter in collaboration with the Financial Administrator, and oversee agency mailings and mail distribution to staff;
- Ensure incoming faxes are distributed to staff in collaboration with the other agency receptionists;
- Assist as needed to maintain daily Income Log(s) and distribute to appropriate staff members;
- Report maintenance problems to appropriate persons.
- Perform other duties as requested by supervisor.
- Greet clients, seat in waiting area, and contact the appropriate counselor;
- Initiate calls to clients upon receipt of referrals to the program; interview clients and schedule intakes for the program;
- Complete and fax applications to Social Security, follows intake coordinator policies and procedures as written, assign client counselor and records information in Paragon Appointments, keep intake spreadsheet up to date along with the client counselors;



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- Assist with processing checks for mailing as needed;
- Assist with distributing the Calendar to client;
- Take client requests for extra checks over the phone and notify counselor;
- Other duties as requested by the supervisor.

Agency Responsibilities

- Promote a positive image of agency by ensuring an understanding of program services and other community services that are available;
- Adhere to established agency policies and procedures;
- Serve as a team player and maintain harmonious working relationships with agency staff, United Way, educators, business associates, customers, and other related service agencies by amenable and cooperative contacts;
- Assure confidentiality of information related to clients and other information of confidential nature as established by the standards of the Council of Accreditation for Services to Families & Children (COA) and/or agency management;
- Maintain active professional competency by participating in training and workshops for professional growth in areas pertaining to duties;
- Meet regularly with Program Director and Counseling Staff regarding responsibilities and share concerns/suggestions relating to customer service and internal operations.

Equipment Used: Telephone, copier, computer, MS Office

Working Conditions: General office environment

Physical and Mental Requirements

- Frequent: standing, reaching, sitting, walking, seeing, driving, hearing, writing, reading, problem solving, decision making, organizing, interpreting data
- Often:

Employee Signature

Date