

BALANCE Job Description

Job Title: Intake and Assessment Counselor 1

Department: BALANCE

Reports To: Call Center Supervisor

FLSA Status: non-exempt

Reviewed By: Joy Refuerzo

Review Date: February 2010

Summary

Provides accurate, relevant, and helpful information to assist clients and potential clients in developing solutions to money management/credit related issues via telephone.

Essential Duties and Responsibilities include the following. Other duties may be assigned.

Promptly answers incoming calls from clients and determines nature and degree of problem or question for proper course of action.

When handling InfoLine calls, provides information to clients including, but not limited to, bankruptcy, collection action, court judgments, credit education, credit reports, housing issues, consumer protection laws, student loans, wage attachments, financial planning, etc.

When handling Customer Service calls, interprets database screens to resolve a course of action that will solve a client's problem, and follow established customer service procedures. Knowledgeable about program services, consumer rights, credit reports, money management, and budgeting to be able to discuss personal finance issues with clients.

Provides current information to clients about national and community resources and other organizations, and refers clients as appropriate.

Schedules appointments for clients, confirms daily appointments, and reschedules appointments as necessary.

Sets up mailing of all preliminary paperwork to all clients in a timely manner.

Interacts diplomatically with diverse clientele, and communicates comfortably and confidently over the telephone and in person.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Problem Solving - Gathers and analyzes information skillfully; Uses reason even when dealing with emotional topics.

Technical Skills - Pursues training and development opportunities; Strives to continuously build knowledge and skills; Shares expertise with others. Demonstrates attention to detail.

Customer Service - Manages difficult or emotional customer situations; Responds promptly to customer needs; Responds to requests for service and assistance.

Interpersonal Skills - Focuses on solving conflict, not blaming; Listens to others without interrupting; Keeps emotions under control.

Oral Communication - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions.

Written Communication - Writes clearly and informatively; Edits work for spelling and grammar.

Teamwork - Balances team and individual responsibilities; Contributes to building a positive team spirit.

Quality Management - Demonstrates accuracy and thoroughness.

Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values.

Judgment - Exhibits sound and accurate judgment; Includes appropriate people in decision-making process.

Motivation - Measures self against standard of excellence.

Planning/Organizing - Uses time efficiently.

Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions.

Quality - Demonstrates accuracy and thoroughness; Applies feedback to improve performance; Monitors own work to ensure quality.

Quantity - Meets productivity standards; Completes work in timely manner.

Safety and Security - Observes safety and security procedures; Uses equipment and materials properly.

Adaptability - Adapts to changes in the work environment; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered when absent.

Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions; Completes tasks on time or notifies appropriate person with an alternate plan.

Initiative - Volunteers readily; Asks for and offers help when needed.

Qualifications To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience

Bachelor's degree (B. A.) from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.

Language Skills

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of organization.

Mathematical Skills

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

Reasoning Ability

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Computer Skills

To perform this job successfully, an individual should have knowledge of Internet software; Spreadsheet software and Word Processing software.

Certificates, Licenses, Registrations

Must successfully pass NFCC Counselor Certification exams 1 through 6 within 6 months from date of hire. Must successfully pass NFCC Counselor Certification exam 7 within 12 months from date of hire. Must successfully pass FCRA and CIC Certification within 12 months from date of hire.

Requisite Skills and Abilities

Ability to conduct Credit Report Reviews, and Specialty Counseling including but not limited to Check Book Balancing, First Time Car Buyer and Youth Visa sessions.

Other Skills and Abilities

Bilingual abilities if applicable.

Other Qualifications

Ability to work flexible hours as necessary.

Physical Demands 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. 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 regularly required to talk or hear, communicate confidently over the phone and in person.

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

The noise level in the work environment is usually moderate.