Job Description: **Intake Specialist**

**NATURE OF WORK**
The basic function of this position is to provide basic legal secretarial and administrative support services as assigned by Managing or Supervising Attorney and assist other staff members as requested by a management designee and as needed.

**DUTIES AND RESPONSIBILITIES**
- Manage incoming calls to local office of statewide program. Screen applicants for program eligibility, including financial information, citizenship/non-citizen status, and conflicts checks. Become knowledgeable about the legal problems handled by CLS and use that information to gather information related to callers’ legal problems. Make initial determination as to suitability of applicant for CLS services or other legal or community referrals;
- Participate in Coordinated Statewide Intake system and conduct client screening for applicants throughout the state. Must be able to take direction from local office and through remote management based upon project requirements;
- Be sensitive to the needs of low-income, marginalized and vulnerable individuals and able to be patient and kind with applicants and clients at all times, many of whom are in distress due to their legal issues or have experienced trauma related to their case;
- Prepare various internal and legal forms;
- Answer incoming calls at general office number. Take appropriate messages and respond to all e-mails and phone messages in a timely manner;
- Organization: file documents in established legal files, establish new files. Set up electronic files, scan documents to electronic files, maintain electronic records of all actions taken on client files;
- Client and other outside contacts: greet applicants/clients/visitors in reception area, refer all inquiries to supervisor(s), upon request;
- Training and Education: Review program informational materials and attend unit/office meetings, training sessions and other informational meetings as required to maintain current working knowledge of the program’s policies and procedures as well as the computer system hardware and software requirements and capabilities;
- Assist other secretaries, paralegals, attorneys and other staff as needed; and
- Perform all other duties as assigned.

**QUALIFICATIONS**
- Basic secretarial skills (familiarity and basic competency with Microsoft Office, other software programs, and office equipment including copiers/scanners and phones.), good grammar, spelling and proofreading skills and basic knowledge of legal terminology.
- Strong communication, interpersonal skills, and professionalism to deal with a wide variety of people.
- Organizational skills to handle a fast-paced work environment and juggle many competing demands. Must work effectively under pressure to meet tight deadlines.
- Spanish fluency preferred, but not required.