



Recipient Intake

Reports to: Chief Operating Officer

Supervisory Responsibility: None

Position Classification: Full Time, Non-Exempt, Hourly

Position Description: The Recipient Intake team member primarily assists recipients with enrolling in the Meals On Wheels of Tampa (MOW Tampa) service. Must be able to gather information, build rapport, and show compassion over the phone.

Position Skills & Qualifications:

- Bachelor's Degree in a related field
- 3-5 years' experience in case management, social work, or related
- Compassionate, caring phone manners and communication skills
- Bilingual (English and Spanish)
- Clerical, word processing, and office skills
- Demonstrated ability to organize resources and establish priorities
- Mission focus

Duties and Responsibilities:

- Responsible for adding new recipients to the program; gathering information, prescreening, explaining the program, determining fair meal pricing, performing background checks, collecting deposits (if applicable), and setting up recipient meal schedules in the database.
- Responsible for generating welcome packages for all new recipients.
- Responsible for following up with those waiting for service; managing the call list to ensure recipients are called and set up promptly.
- Responsible for 3rd Party Authorizations, making sure new authorizations are received, recipient meal schedules are updated, and paperwork is filed appropriately. Working directly with case managers to obtain meal service authorizations when needed.
- Be a primary contact and advocate for recipients who call in with issues, or those who are identified for early intervention or problem-solving (home visit may be required)
- Responsible for keeping up-to-date on new partnerships and the details of each as it pertains to putting new recipients into the database.
- Perform new recipient check-ins and termination surveys, as requested.
- Assist recipients with additional resources, such as Animeals program and other community resources, follow up with recipients who have repeated issues with meal deliveries or payment difficulties follow up with caseworkers or emergency contacts as needed.
- Develop and maintain a working knowledge of all services and resources provided by the organization and available within the community.
- Ensure Operations is notified if route sizes become too large or may in the near future.
- Field calls and emails from recipients, case managers, and insurance providers.



- Review inactive recipients and follow up where appropriate.
- Work with the Finance Department to call past due recipients, help collect past due amounts, and perform a new financial intake when needed.
- Backup to the Recipient Specialist position and cover while out sick and/or on vacation.
- Be willing to perform a home visit as necessary.
- Be cross-trained in other clerical and office-related responsibilities.
- Participate in monthly Saturday events; a minimum of 3 per year.
- Be a positive team member for MOW Tampa and actively participate in all MOW Tampa functions.
- Other duties as assigned.