



**Corporate Work Study Program
Job Descriptions**

Cristo Rey Dallas College Prep is a private, independent Catholic high school, located in the Pleasant Grove area of Southeast Dallas. The Cristo Rey Network's formula for success is a proven, revolutionary model of college preparatory high school curriculum accessible to those of low to moderate household income.

Finance & Accounting

Customer Service

Human Resources

Information Technology

Law

Marketing

Supply Chain Operations

Healthcare

Sales

Remote Work



Finance & Accounting

- Updating client summary lead sheets for financial automated control testing reports
- Organizing deposit and withdrawal slips, filing bank statement receipts
- Making trial verification deposit balances in client accounts to confirm bank accounts
- Separating and posting checks into CRM database
- Migrating data to new databases
- Reviewing bank statements and credit reports
- Assisting with tax return completion and filing
- Updating client identification numbers for tax returns
- Preparing tax depreciation import files
- Creating and updating tax refund spreadsheets
- Digitalizing tax apportionment binders
- Updating tax management portfolios
- Distributing and Mailing W-9 Taxpayer Identification Number and Certification Forms
- Scanning and indexing transaction and exit tickets
- Creating excel sheets detailing bank statements, reviewing customer statement accounts
- Extracting closed account information from CRM
- Conducting research on CIDs (Confidential Invoice Discounting)
- Verifying loan numbers



| Customer Service

- Preparing letters and composing emails to clients
- Creating letter templates for correspondence to clients
- Uploading scanned invoices and documents onto CRM
- Documenting incident reports into Excel
- Summarizing received letter content
- Making announcement slides for TV monitors
- Preparing Excel spreadsheets to monitor and track matching gift programs for annual funds and initiatives
- Tracking and indexing credit card statements
- Scanning and laminating important documents for retention
- Transferring information from client business cards to electronic format
- Processing insurance verification claims
- Sorting and categorizing certificates of Insurance
- Preparing files for new applicants in assured, prospect, and lead accounts for companies seeking insurance
- Scanning documents and reporting credits, withdrawals, and declined transactions
- Producing receipts for checks and ledgers for account balances
- Documenting, organizing, and updating customer account information and payments
- Accessing database documents
- Scanning vehicle registration and permit numbers into CRM



Human Resources

- Researching potential candidates on LinkedIn
- Conducting beneficiary and worker compensation audits
- Filing and tracking United States Citizenship and Immigration verification documents prepared by outside Counsel
- Assisting with office CPR demonstrations and safety trainings
- Creating packets and materials for new employee hires
- Scheduling calendar events
- Preparing Excel Spreadsheets and reviewing new hire profiles
- Making, sorting, and distributing personnel keys
- Tracking auto mileage usage for employees
- Processing and mailing checks for tuition and travel grants
- Scanning documents and reporting credits, withdrawals, and declined transactions
- Creating incident report files
- Shredding sensitive and/or outdated documents and materials
- Verifying and mailing payroll checks to employees
- Collecting, documenting, and analyzing pay rates and compensation across given employment fields
- Entering new employee information into E-Verify
- Updating and formatting lists of new hires and terminated employees in Excel
- Preparing letters and composing emails to clients
- Creating and preparing folders and merchandise for network events
- Scanning and organizing recruitment documents
- Making phone calls to new hires for orientation and registration
- Properly disposing of terminated employee information



Human Resources Cont.

- Verifying and preparing Paid Time Off tracking (PTO) spreadsheets in Excel
- Transcribing exit interviews for employees
- Filing W-4s, direct deposit forms
- Entering, filing, and updating invoices in CRM
- Reviewing and updating employee policy manuals
- Sourcing resumes
- Making phone calls to verify employment and termination dates
- Filing active and terminated employee reports
- Assisting with event planning, booking reservations
- Maintaining schedules for shared meeting spaces and preparing rooms for meetings
- Setting up and tidying offices and event spaces
- Assisting with administrative paperwork



Information Technology

- Loading software onto new computers
- Receiving equipment orders, unboxing and distributing monitors and equipment
- Verifying proper function and optimal utilization of software, conducting status checks
- Performing discovery work using service mapping
- Completing year-end update testing on CRM
- Preparing and setting up computers for new hires
- Assisting employees with technical problems, providing technical laptop and monitor support
- Wiping laptops, hard drives, iphones, androids, and computer monitors
- Ordering equipment and disposing of outdated equipment
- Filling out condition reports for equipment
- Fixing faulty equipment (for example: fax machine)
- Entering serial numbers from devices into Excel spreadsheet
- Updating and uploading corporate websites and social media accounts
- Completing database projects and adjusting database errors
- Conducting inventory of IT equipment
- Updating summary lead sheet for automated control testing
- Cleaning and storing equipment in empty workspaces with IT
- Reviewing security footage with security staff
- Activating security badges and security lists



Law

- Transferring client data into new online CRM
- Review court docket information
- Updating client guideline memos, creating invoice tracking sheets in Excel
- Verifying the status of patent applications
- Attending discovery meetings and preparing evidence lists
- Filing documents, interviews, reports, depositions, and invoices
- Sorting and organizing evidence for the preparation of court summaries
- Filing disposed and bench warrant files
- Hand delivering motions and correspondence
- Updating expert witness database in Excel
- Retrieving and preparing files for trial, labeling exhibit, hole punching submissions
- Preparing prospective and client case files
- Preparing synopsis for summary reports and verifying accuracy
- Create social media posts and graphics for firm advertisements
- Preparing trial books for cases
- Preparing case reviews for discovery packets
- Indexing files into Accutrac (records management system)
- Redacting indicated sensitive and privileged data/documents
- Confirming and noting court orders, gathering information to create subpoenas
- Preparing letters and composing emails to clients; sorting, distributing, stamping, sealing, and filing mail



Marketing

- Preparing and updating data in Excel; matching data cells from data sources using Vlookup commands
- Using ZoomInfo and Cobalt databases to extract data sources
- Copying agendas and documents for board meetings
- Completing Excel projects (invoicing, graphs, updating analytics, etc.)
- Analyzing and resolving outlier records using Transactional Data (TDR) reporting and other tracking programs
- Updating Draft Pro Forms
- Preparing plans in Strata View to plan commercials and advertisements
- Creating PowerPoint presentations
- Tracking backorders, approvals, and denials in Global Strategic Marketing Department
- Researching proposals and press releases
- Drafting summaries for upcoming events
- Creating infographics for events
- Creating content for presentations
- Creating and posting blogs and social media posts
- Creating informative presentations for employee travel
- Preparing blogs for company website
- Updating sponsors on marketing data
- Entering indicators and data into CRM
- Analyzing data for sales team
- Assisting with the promotion of charity and sponsored events



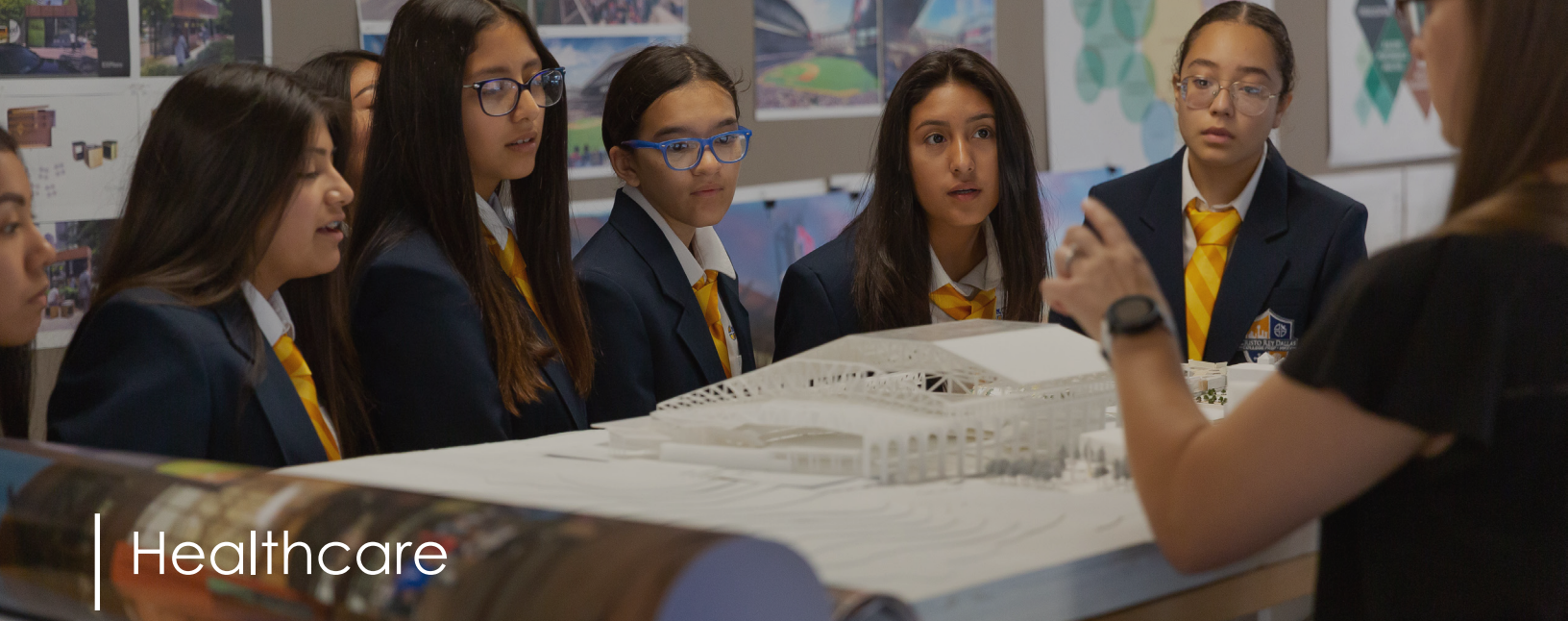
Marketing Cont.

- Preparing deliverable reports for managers
- Scheduling and preparing monthly social media posts
- Preparing “Economic Wins” reports for meeting preparation
- Generating passback reports and tags
- Traveling to local client meetings and assisting with hospitality
- Assisting team members with general marketing objectives and projects
- Monitoring and printing expense reports



Supply Chain Operations

- Verifying and sending purchase orders to suppliers
- Scanning and preparing memos and invoices; filing in online databases
- Processing customer feedback
- Filing weight and measures violations
- Preparing and reviewing spreadsheets for supply chain distribution
- Assisting with logistical imports and exports
- Completing hazmat classification reports
- Creating route maps
- Tracing and tracking pickups and deliveries for customers
- Updating new information in calendars, preparing Excel spreadsheets
- Creating, updating, and processing invoices
- Activating and deactivating meters for future placements
- Organizing and filing service notices
- Transferring basic reclosure data into excel
- Extracting data to determine cause of product malfunctions and outages
- Utilizing asset suite to find the job type and priority of work orders
- Assisting engineers with building inspections
- Preparing Accupac reports, assisting with the administration of inventory management
- Scanning and unboxing equipment crates, organizing inventory for customer dissemination



Healthcare

- Assisting physicians, nurses, and technicians in the retrieval of tools and equipment
- Checking in patients and filing admittance records
- Transporting patients to appointments
- Assisting with patient status checks and discharging patients
- Filing acknowledgment of paternity documents
- Organizing benefits folders and patient data for hospital staff into Excel
- Making informative posters and flyers for hospital initiatives
- Calling patients to confirm appointments
- Assisting with the preparation of living wills and powers of attorney
- Creating orientation packets for incoming residents, helping set up curriculums for residents and staff
- Allocating cell substances for laboratory experiments
- Organizing lab specimens; delivering laboratory specimens to technicians
- Researching medical conditions for residents and physicians
- Reviewing drug information for patients
- Labeling and cleaning incubators, surgical instruments and equipment
- Assisting with opioid compliance requirements and vaccinations
- Completing patient assessments
- Entering patient refund data into CRM
- Assisting with patient physical therapy
- Helping mothers with breathing exercises during labor
- Preparing Powerpoint Presentations
- Scanning documents and invoices
- Participating and preparing activities for patients, such as bingo, arts and crafts, and trivia games.



Sales

- Covering receptionist duties and greeting customers/clients
- Researching competitor markets, preparing charts and graphical representations in Excel
- Tracking inventory through CRM Zebra and posting payments
- Downloading title surveys, commitment agreements, and policies for real estate properties
- Processing and inputting data and orders into Salesforce
- Consolidating and recording deliverables in ShareFile
- Providing customer service in person and/or over the phone
- Preparing letters and composing emails to current and prospective clients
- Assisting associates with coverage on the sales floor
- Preparing and editing letters for client mailings
- Creating and maintaining client correspondence lists
- Observing the sales floor to prevent loss and theft
- Assembling and organizing merchandise displays
- Scanning, processing, alphabetizing, managing, and mailing invoices
- Completing purchase orders
- Filing billing information in CRM
- Collecting sales checks and inputting information into Excel
- Stocking and restocking, scanning, sorting, verifying, and conducting inventory of merchandise
- Rollstock tracking
- Loading USB drives with store information
- Preparing PowerPoint presentations for community events
- Receiving, sorting, and distributing sweepstakes entries
- Creating new customer/client information packets



Sales Cont.

- Inputting settlement dates into Excel
- Contacting prospective tenants through LinkedIn
- Contacting vendors for status updates on merchandise
- Filing contract certifications
- Editing and converting PDF documents
- Imaging deed packages
- Emailing listing agents
- Presenting customers with closing instructions
- Making phone calls to Home Owner Associations (HOA)
- Entering data into Mortgage Maestro
- Drafting letters for Home Equity Lines of Credit (HELOC) renewal accounts
- Assisting with event planning
- Sorting files and organizing invoice codes
- Creating and binding pitch books



Remote Work

CRM & Social Media

- Driving connectivity, creating posts
- Population targeting and driving proper channels based on demographics
- Managing social media accounts
- Updating websites

Accounting System Processing

- Adding customer and supplier accounts
- Issuing invoices
- User management – adding or deleting users
- Data entry support
- Updating client summary lead sheets for financial automated control testing reports
- Preparing tax depreciation import files
- Distributing and Mailing W-9 forms
- Extracting closed account information from CRM
- Activating and deactivating customer accounts
- Digitizing tax apportionment binders

HR/Payroll & benefits

- Organizing / walking employees through on-boarding tasks
- Pulling tax statements and other standard reporting
- Alumni events

Customer Sales Support

- Creative design
- Tailored proposals
- Translations from English to other languages including local dialect
- Enrolling customers
- Addressing customer complaints.

Virtual Office Support

- Inbox monitoring – initial replies to basic questions, routing to level 2 or higher support - Settings up meetings and calendar bookings
- Helping with using the tools – Zoom, Webex, Teams, etc.
- Adding or deleting users to programs
- Recording and hosting meetings and cataloging items including summary descriptions of the content
- General support – formatting, filing, standardization of data, etc.