

## **JOB DESCRIPTION**

**PROGRAM:** Utilities Assistance Program

**JOB TITLE:** Customer Service Specialist

**PAY GRADE:** 5

### **JOB SUMMARY**

Detail-oriented, public contact position providing informational, and both general and specialized clerical support within the Utilities Assistance Program. Work involves entering information into a computer, performing specialized customer services for utility-related programs, such as PPL OnTrack and UGI CAP, or performing specialized customer assessment and eligibility services for STEP's One-Stop Program. Provides customers with resource and referral information to meet identified needs. Work involves recording and processing data, maintaining customer files, and following-up on incomplete information.

### **SUPERVISORY RELATIONSHIPS**

**SUPERVISES:** Not Applicable

**REPORTS TO:** Utilities Assistance Lead

### **ESSENTIAL QUALIFICATIONS**

- High school diploma or GED certificate;
- One year of experience in office work;
- Strong communication skills including listening, understanding, informing, and speaking; amiable disposition and ability to remain professional when dealing with telephone callers or visitors; and,
- Demonstrable experience with utilizing databases and/or spreadsheets, utilizing standardized formulas correctly, accurate data entry, and report printing.

### **GENERAL REQUIREMENTS**

- Valid driver's license and vehicle with adequate insurance coverage available for daily use;
- Pennsylvania State Police Criminal History Clearance, Child Abuse Clearance, FBI Clearance, and National Sex Offender Registry check current within 90 days of employment; and Motor Vehicle Record check;
- Computer experience with word processing, spreadsheet, and database programs; familiarity with data entry into databases and spreadsheets and their printing;
- Physical ability to perform essential job functions without any health restrictions, including the ability to sit for long periods of time; stand, lift, and carry up to twenty pounds; have unrestricted use of the upper body, corrected or uncorrected hearing and vision within normal ranges, and a clear speaking voice;
- Non-traditional work hours, as assigned; and,
- Job-related training, as assigned.

### **SPECIFIC DUTIES**

- ❖ Greet visitors to the Program office; direct them to the appropriate person and area of the office, as necessary;
- ❖ Answer telephone and accept or relay calls to the appropriate person; take messages and/or answer questions, as needed;
- ❖ Explain program requirements to customers; refer customers to other programs, as appropriate;

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- ❖ Collect intake, assessment, and eligibility information as appropriate; input information for documentation purposes;
- ❖ Perform eligibility pre-screenings and respond with appropriate disposition of case;
- ❖ If appropriate, determine utility-related customer assistance program eligibility utilizing utility program procedures and guidelines; verify payment troubled status; contact customer to suggest additional ways to verify income if necessary;
- ❖ If appropriate, determine Community Services Block Grant (CSBG) eligibility utilizing program procedures and guidelines;
- ❖ Gather and enter data and written materials into various program software; produce records, reports, labels, and information as requested or directed;
- ❖ Enter select data accurately into the web-enabled agency database; when requested, verify information in database for requesting staff;
- ❖ As appropriate, assemble materials for files and maintain client tracking system for funding source and re-determination purposes as necessary;
- ❖ When appropriate, review utility-related customers' accounts utilizing utility's data system and gather appropriate customer-related information; explain program requirements to customers as appropriate;
- ❖ Utilize utility's system to process program referrals and recurring referrals as required;
- ❖ Mail utility customer assistance application cover letter, customer fact sheet, income verification requirements, application and similar program documents to customer; add critical contacts on customer accounts regarding pending eligibility and non-compliance; record letters sent and phone contacts on accounts;
- ❖ Check for active payment agreements or collection arrangements; check account for prior defaults, shortfalls, or other removals;
- ❖ Create critical contact on customer account when necessary;
- ❖ Respond to eligibility re-certifications as required; mail recertification letter, customer fact sheet, income verification requirements, and application to customer;
- ❖ Perform registrations, assessments, referrals, eligibilities, and re-determinations based on laws and funding regulations regarding income, family size, and other factors;
- ❖ Educate individuals and families about all service choices;
- ❖ Follow established agency procedures; secure all required documentation from consumers;
- ❖ Maintain up-to-date familiarity with all pertinent regulations and policies;
- ❖ Track and report time spent on program services;
- ❖ Provide assigned customer service tasks to support One-Stop intake, assessment, information and referral, and eligibility processes for which training has been provided;
- ❖ Work collaboratively and provide support to Service Navigation team as needed or directed;
- ❖ File forms, records, and reports and retrieves information from files; maintain filing system;
- ❖ Receive or retrieve information, compile facts, figures, and statistics and type reports;
- ❖ Operate computer hardware and other office machines;
- ❖ Maintain confidentiality at all times; and,
- ❖ Perform related work as requested.

**REQUIRED KNOWLEDGE, SKILLS & ABILITIES**

- ❖ Knowledge of the following:
  - Effective customer service principles;
  - Utility-related customer assistance programs and their services, including their regulations, policies, and procedures;
  - Community resources, service organizations, and service programs;

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- Microsoft Office Suite, including but not limited to Microsoft Word and Outlook components;
  - Geographic area served;
  - Standard office procedures, practices, conduct, and action necessary in maintaining harmonious working relationships;
  - English grammar, spelling, and punctuation; and,
  - Type, organization, and use of standard office files, logs, forms, and letter formats.
- ❖ Skill in the following:
- Communication so as to be able to interact with a variety of people such as customers, staff, community resource personnel, and the general public;
  - Interviewing to gather, record, and analyze facts and basic financial information;
  - Using a keyboard or typewriter to process information into written or electronic form;
  - Processing and organizing various types of data and information into both written and electronic formats;
  - Using and routing electronic mail and correspondence, using the Internet for information mining, using various software within a personal computing environment, and using disk operating systems for computer navigation and document management; and,
  - Using word processing, spreadsheet, and database software for document creation, and informational assistance and management.
- ❖ Ability to perform the following:
- Efficiently answer a wide variety of questions from telephone inquiries or walk-in visitors, and deal with the public in an empathetic manner;
  - Daily record keeping functions and prepare required reports as requested;
  - Effectively utilize a computer to facilitate communication and track Program information;
  - Enter data into program software systems and produce reports requested or required;
  - Keep accurate customer records;
  - Understand and follow oral and/or written instructions, some of which may include multi-faceted procedures, and work independently of direct supervision;
  - Keep simple and complex clerical records accurately, and prepare accurate reports;
  - Proofread information for conformance with instructions or for compliance to specific administrative or procedural rules;
  - Collect, organize, and process information for requested reports;
  - Simple and complex mathematical computations;
  - Organize and prioritize work, and develop effective work methods in an area which involves variable phases or different techniques and procedures;
  - Collect, organize, and process information, as requested;
  - Project a positive and professional image;
  - Establish and maintain effective working relationships with staff, partnering agencies, businesses, customers, and the general public;
  - Demonstrate respect for individuals and groups with varied cultural, racial, ethnic, religious, and linguistic identities or backgrounds;
  - Understand problems of customers and the ability to exercise sound judgment in appraising needs of customers and directing them to appropriate service to meet their needs;
  - Interact effectively with people from varied social, economic, and educational backgrounds; and,
  - Maintain confidentiality at all times.