

JOB DESCRIPTION

PROGRAM: Service Navigation
JOB TITLE: Compliance/Customer Service Specialist
PAY GRADE: 5

JOB SUMMARY

Detail-oriented, public contact position within the Service Navigation program. Work involves entering information into computer, performing specialized customer services, or performing specialized customer assessment and eligibility services for STEP's One-Stop Program. Reviewing both electronic and paper files to ensure program compliance and accuracy. Assists Service Navigation team with organization and maintenance of all files. Provides customers with resource and referral information to meet identified needs, when needed. Work also involves providing receptionist and clerical support in the Administration Section of STEP's Main Office when assigned, complete 211 intake assessments, recording and processing data, maintaining customer files, and following up on incomplete information.

SUPERVISORY RELATIONSHIPS

SUPERVISES: Not Applicable
REPORTS TO: Customer Service 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;
- Detail-oriented with exceptional analytical, investigative, and organizational skills;
- Extensive knowledge of program regulations and governing laws;
- Experience with ensuring compliance and accuracy; and,
- Demonstrable experience with utilizing databases and/or spreadsheets, utilizing standardized formulas correctly, entering data accurately, and printing reports.

GENERAL REQUIREMENTS

- Pennsylvania State Police Criminal History Clearance, Child Abuse Clearance, FBI Clearance, and National Sex Offender Registry check current within 90 days of employment;
- Recognizing and Reporting Child Abuse training completed within 90 days of hire;
- Computer experience with word processing, spreadsheet, and database programs; familiarity with data entry into databases and spreadsheets and their printing;
- Experience with ClientTrack, preferred;
- Mental and 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 unassisted, have unrestricted use of the upper body, finger dexterity, corrected or uncorrected hearing and vision within normal ranges, and a clear speaking voice; and,
- Participation in job-related trainings, as assigned.

SPECIFIC DUTIES

- ❖ Interviewing executives, managers, and employees to determine compliance-related priorities;

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- ❖ Reviewing documentation, processes, and practices;
- ❖ Developing and enacting regulatory compliance strategies; coordinating regulatory compliance procedures across organizational structures;
- ❖ Monitoring compliance and facilitating interventions to manage risks; performing compliance audits and compiling reports; documenting compliance-related processes and maintaining records;
- ❖ Providing training in compliance practices and procedures;
- ❖ Keeping up to date with regulatory changes;
- ❖ Explain program requirements to customers; refer customers to other programs, as appropriate;
- ❖ Collect intake, assessment, and eligibility information as appropriate; input information for documentation purposes;
- ❖ Perform eligibility pre-screenings and respond with appropriate disposition of case;
- ❖ Work collaboratively and provide support to Service Navigation team and other departments as needed or directed;
- ❖ 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 database; when requested, verify information in database for requesting staff; operate computer hardware and other office machines;
- ❖ As appropriate, assemble materials for file and maintain client tracking system for funding source and re-determination purposes as necessary;
- ❖ Perform registrations, assessments, referrals, eligibilities, and redeterminations 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, as well as securing all required documentation from consumers;
- ❖ Ensures file compliance within databases and paper files for all files in conjunction with Information Technologies;
- ❖ Assist Service Navigation Director and Leadership Team with data collection and the timely submission of necessary reports;
- ❖ 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; provide exceptional customer service;
- ❖ File forms, records, and reports and retrieve information from files; maintain filing system;
- ❖ Receive or retrieve information, compile facts, figures, and statistics and type reports;
- ❖ Purchase supplies and office equipment;
- ❖ Provide receptionist and clerical support in the Administration Section of STEP's Main Office;
- ❖ Complete 211 intake assessments;
- ❖ Maintain confidentiality at all times; and,
- ❖ Perform related work as requested.

REQUIRED KNOWLEDGE, SKILLS & ABILITIES

- ❖ Knowledge of the following:
 - Effective customer service principles;
 - Community resources, service organizations, and service programs;
 - Microsoft Office Suite, including but not limited to Word and Outlook components;

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- 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:
- Detail-oriented with analytical, investigative, and organizational skills as means to ensure accuracy and compliance with all programs within filing systems;
 - Extensive knowledge of program regulations and governing laws and staying abreast of regulatory changes to ensure compliance;
 - Communication 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 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;
 - 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;
 - 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;
 - Project a positive and professional image; and,
 - Maintain confidentiality at all times.