

## **JOB DESCRIPTION**

**PROGRAM:** Utilities Assistance Program  
**JOB TITLE:** Customer Service Specialist  
**CLASSIFICATION:** Eligibility Assessment Worker II  
**PAY GRADE:** 7

### **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 OnTrack, 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

### **QUALIFICATIONS**

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

### **GENERAL REQUIREMENTS**

- Pennsylvania State Police Criminal History Clearance and Child Abuse Clearance current within 90 days of employment;
- Computer experience with word processing, spreadsheet and database programs; familiarity with data entry into databases and spreadsheets and their printing;
- Non-traditional work hours, if assigned;
- Participation in job-related trainings, if assigned;
- Valid driver's license and an adequately insured vehicle available for daily use; 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, have unrestricted use of the upper body, corrected or uncorrected hearing and vision within normal ranges and a clear speaking voice.

### **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;
- ❖ Collect intake, assessment and eligibility information as appropriate; input information for

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- 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, verifies information in database for requesting staff;
- ❖ As appropriate, assemble materials for file 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, shortfall 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, as well as securing 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 & 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, 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.
- ❖ Skills 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 to deal with the public in an empathetic manner;
  - Daily record keeping functions and to prepare required reports as requested;
  - Effectively utilize a computer to facilitate communication and track Program information;
  - Enter data into program software systems and to 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 to work independently of direct supervision;
  - Keep simple and complex clerical records accurately, and to 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 to 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.