

DESCRIPTION: Under general supervision, greets agency customers and clients, and the public on a regular basis; provides direct customer or client service assistance by explaining various agency services available, processes, documents, applications and other forms used, license/permit criteria, fees or fines charged, or assessments or other payments due. Reviews and verifies completeness and accuracy of forms, records, and information and updates records and databases; and may provide other office/clerical support as needed; performs related work as assigned.

DISTINGUISHING CHARACTERISTICS: (A position is assigned to this class based on the scope and level of work performed as outlined below.)

Positions in this job classification are engaged in initial contact on a regular basis with customers and clients, and the public at front desk counters, by telephone, email, and written correspondence, and as needed during public events. Positions answer questions about agency processes, records, and forms and provide assistance in completing documents and following procedures. This contact work involves relaying information, coordinating services, and arranging meetings between customers and clients and agency employees, and may involve handling distraught or irate individuals. After the full range of work is learned, incumbents work independently within well-established procedures and instructions, where guidance regarding new or unusual situations is readily available from other agency employees.

Positions evaluating, determining, and approving the eligibility of customers or clients for an agency's services or in providing technical aid or assistance, would be classified to other program or staff related classes. Positions primarily providing standard office, clerical, administrative or secretarial support to other agency employees, supervisors, or managers would be classified to the office support, secretarial, or other specialized support classes.

EXAMPLES OF WORK: (A position may not be assigned all the duties listed, nor do the listed examples include all the duties that may be assigned.)

Answers questions from customers, clients, and the public about standard agency processes, forms, services, and eligibility criteria to ensure proper application, certification, registration, or eligibility of customers and clients for available program services or status of assistance reviews/determinations.

Obtains and confirms information about customers and clients by asking them and/or others a series of routine questions and relays information to various service providers, users, and related agencies, to share information and facilitate responses to customer and client requests, inquiries, or complaints.

Informs customers and clients of federal, state, or community based services and resources; notifies them of renewals/extensions needed; directs/refers them to available service providers or alternatives that meet their needs.

Schedules appointments, group sessions, and other meetings between customers and clients and agency employees or other service providers/resources to arrange for needed services.

Reviews forms completed, credentials, and other documents furnished by customers or clients to ensure accuracy, completeness, and relevancy of the information; uses various records/data systems to identify status of and update information on services rendered or transactions processed.

S01610 – CLIENT INTAKE CLERK (continued)

Writes standardized correspondence, transmittals, acknowledgements, and reports involving information or inquiries/complaints from customers, clients, and the public to exchange information with and relay their requests to agency employees or other service providers.

Calculates and verifies charges and prepares billings or refunds for licenses/permits issued, fees/fines charged, assessments levied, or other agency services rendered.

Provides office/clerical support as needed, such as processing incoming/outgoing mail, emails, documents, and material; typing correspondence and reports for agency employees; coding, entering, and updating data using established recordkeeping systems; preparing forms to process administrative transactions; and requisitioning equipment and supplies and maintaining repair and inventory records.

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED: (These are needed to perform the work assigned.)

Knowledge of: standard office support procedures for handling inquiries and requests and processing information and records; record and file keeping methods and equipment; grammar usage and style; formats used in written business communications; customer service and telephone etiquette practices.

Ability to: interact tactfully with persons from various socio-economic levels and understand their specific needs and attitudes; communicate in person, and by telephone, computer, email, and correspondence with work unit supervisors and co-workers, other agency employees, and visitors to exchange information using terminology understood by customers, clients, and the public; handle difficult or irate individuals and maintain harmonious relationships; adapt quickly to changes in procedures and conditions and to interruptions that disrupt workflow; understand, use, and maintain various directories and other reference material; review standardized documents and forms for accuracy and completeness; code and record information; set up and maintain recordkeeping/filing systems and databases; operate office machines including personal computers, calculators, typewriters, and reproduction equipment, and a multi-line telephone; calculate arithmetical computations including the use of percentages and discounts.

MINIMUM QUALIFICATIONS: (Applicants will be screened for possession of these qualifications. Applicants who need accommodation in the selection process should request this in advance.)

Experience in providing services or publicly information to the public, involving extensive contacts with the customers or clients.

OR

Coursework/training in business/office/clerical support or records management, supplemented by human or interpersonal relations, speech, public relations, interviewing techniques, or business communications coursework/training.

SPECIAL NOTES:

State agencies are responsible to evaluate each of their positions to determine their individual overtime eligibility status as required by the Fair Labor Standards Act (FLSA).