



## JOB DESCRIPTION

<b>Job Title:</b> Customer Service Representative	<b>Department:</b> Social Services	<b>Division:</b> Ontario Works	<b>Reports to:</b> Site Supervisor
<b>Revision Date:</b> June 2009	<b>Salary Grid:</b> 3		

<b>Approval:</b>	Department Head	_____
	Supervisor	_____
	Employee	_____
	Staff Administration Committee	_____
		_____
		_____

The above signatures acknowledge agreement for all **8 pages** of this document.

### Position Summary:

Reporting to an Ontario Works Supervisor, the Customer Services Representative provides support to the Ontario Works Division in the day-to-day administration for the delivery of services while maintaining confidentiality.

### Qualifications:

- Grade 12 Diploma – with post-secondary courses in a relevant field.
- 6 to 9 months experience in an office setting.
- Excellent interpersonal, verbal, and written communication skills.
- Advanced computer and keyboard skills with word processing and spreadsheet software.
- Valid driver’s license and access to a reliable vehicle.

### Position Responsibilities:

1. Performs the responsibilities of the position within the legislative and regulatory standards set out in the applicable Provincial and Municipal Acts. Performs the responsibilities of the position consistent with the Operational policies of the County of Renfrew.
2. Performs front desk general inquiries and Intake Services.
3. Performs front desk receptionist services. Provides employment support to participants and maintains employment resource centres.
4. Develops and maintains files including data input into SDMT, transfers, archived files, CVP, funerals, and databases.



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5. Accepts and posts repayments/reimbursements including those from the Family Responsibilities Office.
6. Delivers group/workshop instruction in job search techniques, job maintenance and the Ontario Works Information Session.
7. Provides office support and ensures effective flow of information. Responsible for receiving information, ordering and maintaining of supplies/forms, preparing reports, and open and close office in accordance with approved protocols.
8. Responsible for daily/monthly cheque printing functions.
9. Protects own health and health of others by adopting safe work practices, reporting unsafe conditions immediately, and attending all relevant in-services regarding occupational health and safety. Follows all guidelines for employees and employers as legislated under the Ontario Occupational Health and Safety Act.

**The foregoing description reflects the general duties necessary to describe the principal functions of the job identified and shall not be construed to be all of the work requirements that may be inherent in this classification.**

<b>LIMITS OF AUTHORITY</b>
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The employer has the following limits of authority for the position noted above.

- |   |
|---|
| 1. The employee will not disclose privileged or confidential information.   |
| 2. The employee will not release personnel files for employee review without authorization from the Supervisor and Manager of Ontario Works, Director of Social services and Director of Human Resources. |
| 3. The employee will not make purchases without appropriate authorization.  |
| 4. The employee will not contact, reply verbally or provide reports to the media.   |
| 5.  |
| 6.  |



## JOB FACT SHEET

<b>Job Title:</b> Customer Service Representative	<b>Department:</b> Social Services	<b>Division:</b> Ontario Works	<b>Reports to:</b> Site Supervisor
<b>Employee Name:</b>		<b>Date:</b> June 2009	

This questionnaire is not connected with your performance on the job. Please complete this form as accurately as possible.

### **SUMMARY:**

List the 4 or 5 major activities you undertake. Describe each item, by phrase, in the spaces provided. Estimate (to the nearest 5%) the percentage of time per year you spend on each.

1. Customer Service/Intake Services	40 %
2. General Administrative/SDMT Duties	30 %
3. Delivering Ontario Works Information Sessions/Workshops	10 %
4. Management of office filings systems and Employment Resources Centres	10 %
5. Cheque printing functions/reimbursements/repayments	10 %

### **DESCRIPTION:**

Write a paragraph to describe each of the five activities listed above. Provide as many examples as you can to illustrate the scope and complexity of the activity.

#### 1. Customer Service/Intake Services:

Customer Services encompasses all duties that involve communicating with Ontario Works clients as well as the general public. These duties include but are not limited to:

- Answering questions from clients regarding their financial eligibility and participation requirements, in person or by telephone. Complete telephone applications in the Service Delivery Model Technology. Ensure all information is in the appropriate windows as per our internal Standard Operating Procedures and policies.
- Provides information on mandatory and discretionary benefits and how to apply for these benefits.
- Assists clients with filling out forms (Income Statements, Declarations, Address Changes, Direct Bank Deposit, etc.); answer income maintenance questions; answer telephone and walk-in inquiries; direct individuals to appropriate resources, collect documentation and assure that all information is provided to appropriate staff; disseminate information; announce appointments; deal with volatile clientele; when Agents are unavailable to see individual(s), discuss client issues with Agent regarding (non-compliance, cheque, rental, employment, etc.) then relay information to client; issue vouchers for optical/medical transportation; prepare dental referrals and drug cards; copy Health Cards and T5's.



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- Completes third party checks (ie: Equifax, Ministry of Transportation (MTO), Ontario Student Assistance Program (OSAP), NCBS on the Net, Employment Insurance (EI) and Managing Enforcement with Computerized Assistance (MECA) and prepare manual files.
- Coordination of emergency services for people who present themselves as homeless (liaising shelter services, food bank services, and Ontario Works appointments for high need clients)

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2. General Administrative Duties/SDMT duties include but are not limited to the following:

- Issuing medical transportation, optical, dental and manual drug cards.
- Assigning Consolidated Verification Process assigning cases, scheduling/rescheduling of all assigned cases, inputting notes in Service Delivery Model Technology regarding each step of the Consolidated Verification Process.
- Responsible for receiving mail in and out, monitoring/repairing office equipment, photocopying, filing, answering the telephone and returning voice mail messages.
- Troubleshoot (computer, photocopier, fax, printer problems).
- Order supplies, prepare correspondence and attach related forms; arrange appointments for staff; ensure boardroom is booked for all sessions; produce and distribute monthly calendars.
- Prepare initial hard green (client) files for Ontario Works Agents to conduct the Verification Interview.
- When a request is received for an ongoing file transfer to another Ontario works office, the Ontario Works Agent will be notified in order to prepare the file to be sent electronically to the requesting office.
- Download and distribute daily and monthly reports to either Renfrew or Pembroke files. Reports are printed and distributed to the individual staff and management.
- Updating policies and procedures for funeral applications and payment, interviewing families/next of kin to determine the financial eligibility of the deceased, review submitted documents and contact financial institutions to verify financial information regarding the deceased, preparing file and propose funding amount for approval, compiling quarterly and annual reports for review by management.

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3. Delivering Ontario Works Information Sessions/Workshops:

- Resumé preparation, cover letters, CHOICES, oversee computer lab, referral services in the community, data entry, front reception, provide up-to-date information on the local job market. Provide employment counselling; encourage clients to pursue further education; refer participants to outside agencies (Human Resources Development



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Canada, Food Bank, Salvation Army etc.); refer clientele to Employment Services Agents for Community Placement or Employment Placement purposes; offer continual employment support (resumé updates/covering letters); prepare clients for interviews, research employers hiring practices/business.

- Explain to session/workshop participants the entire process of Verification Interview, including form completion and required documentation. Fully explain Rights and Responsibilities form; advise clientele of referrals to services (in-house and within the community); facilitate workshop while considering group needs/concerns (providing moral support and offering a listening ear); discuss Participation Agreement and offer examples of what might be expected of a participant; handle any disruptions/outbursts in a professional and tactful manner; provide one-on-one sessions when needed; maintain a clean and secure boardroom; photocopy all forms and prepare room for presentation.

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#### 4. Management of office filing systems and Employment Resources Centres:

- Assist with manual and computerized filing system, follow TOMRMS (The Ontario Municipal Records Management System) filing system, maintain client file room, data entry in Service Delivery Model Technology of client information and appointments. Client information is maintained in a confidential manner. Alphabetically sort participant information then file documentation in appropriate file; shelve files alphabetically, age/code/archive files; travel to satellite office to assist with file aging/coding archiving.
- Answer client/community inquiries for services in the community, keep brochures/pamphlets current and up-to-date on social services in the resource library. Ensure that area remains clean; and oversee smooth operation/coverage of computer lab; troubleshoot (computer, photocopier, fax, printer problems).
- Maintain inventory of supplies/computers.

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#### 5. Cheque printing functions/reimbursements/repayments:

- Responsible for daily, monthly and manual cheque printing using CheqMaster software following procedures as outlined in the internal Standard Operation Procedures and local policies; ensure that the daily pay lists are available for Ontario Works Agent review; cheque stuffing and mailing of cheques.
- Verify that payments are posted as reimbursements or repayments, keep track of cancelled cheques, post Employment Insurance reimbursements, issue vouchers for optical, medical transportation, diabetic supplies and other discretionary or mandatory benefits (excluding funeral and dental).



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**WORKING WITH OTHERS** (exclude those supervised):

**Inside organization:**

<u>Position Contacted</u>	<u>How Often</u>	<u>Purpose</u>
Ontario Works Agents	Daily	Appointments/verify information
Other Customer Service Representatives	As Required	Intake and statistical information
Management	Daily	Technology issues, client issues, procedures

**Outside organization:**

<u>Position Contacted</u>	<u>How Often</u>	<u>Purpose</u>
Local Referral Agencies	As Required	Assist with coordination of Services
Dental Facilities	As required	Coordinate services
Funeral Homes	As required	Payment, information services
ODSP	Weekly	Transfer of files

**EDUCATION:**

What formal education or specialized training, in today's context, is required to adequately perform this job?

Office experience. Grade twelve diploma with post secondary courses in a relevant field. Computer literacy. Knowledge of Ontario Works, Ontario Disability Support Program would be an asset.

Is a Provincial or other vocational professional certification:     Mandatory     Preferred     N/A

**EXPERIENCE:**

How much "on the job" learning time is required to achieve average competence. (Consider the level of education listed above) Check the appropriate time period.

About:     1 month     3 months     **6-9 months**  
                1 year         3 years         5 years         7 years or more



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### **INDEPENDENCE OF ACTION:**

List up to 5 examples of difficult decisions you make or duties you perform without reference to Manager or subsequent checks.

1. Mandatory/Discretionary Benefits
2. Dealing with difficult clients.
3. Data collection for intake telephone services.
4. Resumes/cover letters for clients.
5. \_\_\_\_\_

List up to 5 examples of difficult duties or decisions on which you seek consultation, check or approval of Manager.

1. Issuing funeral benefits for payments.
2. Clarifying policies and procedures, legislation, guidelines and compiling of statistical information.
3. Ordering of office supplies/equipment maintenance.
4. Incident reporting (client behaviour).
5. Scheduling of home visits/changes to scheduling tool.

Do you have supervisory responsibilities?  Yes  No

If yes, indicate the most appropriate (one) description of the supervision you exercise.

- Assign and check work of others doing similar work to myself.
- Provide technical support to junior staff
- Supervise a small group: assign work to be done, the methods to be used, take responsibility for all the work of the group
- Direct the work, practices, and procedures of a major work unit. Establish the unit's priorities, control budgets and costs, work quality
- If these descriptions do not fit, please describe your supervisory responsibilities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



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Check the appropriate number of people for whose work you are fully accountable:

Full time

- 1-3   
 4-10   
 11-15   
 26-35   
 36-50   
 51-75   
 76-125   
 126-200

Part time

- 1-3   
 4-10   
 11-15   
 26-35   
 36-50   
 51-75   
 76-125   
 126-200

### PHYSICAL DEMANDS:

Check the appropriate level(s)

Level of exposure

- |                                       |  |                                     |                                   |   |
|---------------------------------------|--|-------------------------------------|-----------------------------------|---|
| 1. Standing or moving about (inside)  | <input type="checkbox"/> Limited                   | <input type="checkbox"/> Occasional | <input type="checkbox"/> Frequent | <input checked="" type="checkbox"/> <b>Continuous</b> |
| 2. Walking/climbing over rough ground | <input type="checkbox"/> Limited                   | <input type="checkbox"/> Occasional | <input type="checkbox"/> Frequent | <input type="checkbox"/> Continuous                   |
| <b>N/A</b>                            |  |                                     |                                   |   |
| 3. Heavy physical effort              | <input checked="" type="checkbox"/> <b>Limited</b> | <input type="checkbox"/> Occasional | <input type="checkbox"/> Frequent | <input type="checkbox"/> Continuous                   |
| 4. Heavy visual concentration         | <input type="checkbox"/> Limited                   | <input type="checkbox"/> Occasional | <input type="checkbox"/> Frequent | <input checked="" type="checkbox"/> <b>Continuous</b> |

### JOB ENVIRONMENT:

Consider any unpleasant aspects and choose the appropriate level.

- |                                  |                              |
|----------------------------------|------------------------------|
| 1. Comparable to standard office | 3. Noticeably disagreeable   |
| 2. Minor disadvantages           | 4. Continuously disagreeable |

	1	2	3	4		1	2	3	4
Heat	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Outside work	<b>N/A</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cold	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Travel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fumes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Danger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noise	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Examples:

At front reception, have occasion to deal with angry/upset clients who can become verbally abusive, irate or violent.

How many hours per week do you work? 35 Hours.

What regular shift do you have? 8:30 a.m. to 4:30 p.m.

Do you have other irregular hours? Explain; N/A