



## Job Specification

**Position Title:** CLIENT SERVICE REPRESENTATIVES  
**Job Code:** OPSEU - Office Administration 09, 09OAD  
**Job ID:** 11345

### Purpose of Position:

To provide administrative support and perform case management functions within the team environment of the Income Support Program. As the initial program contact, the CSR provides program information, explanations and interpretations to a diverse clientele, the public, advocacy groups and agencies; gathers and reviews client information and circumstances in accordance with ODSP legislation, guidelines and directives, for the purposes of making recommendations to Income Support Specialist for review and authorization of entitlement.

### Duties/Responsibilities:

In a high volume client service environment, performs responsibilities as the initial client contact by:

1. Gathering relevant information and documentation from clients through careful interviewing and effective listening and with the use of available resources, establishing entitlements for the purpose of processing recommendations for benefits, maintaining up-to-date client information, records and forms within the client database; responding to client concerns.
2. Meeting with the client or contacting by telephone for the purpose of: obtaining information, providing program information, explaining legislation, procedures; adapting explanations to ensure client awareness of program requirements and entitlements.
3. Deals with, and responds to, contentious client situations and makes decision to escalate.
4. Contacting external agencies for the purpose of obtaining information to be relayed to the client.
5. Reviewing and verifying cheques in accordance with client notes (may act as first signatory on cheques) and forwarding cheques to Income Support Specialist for final approval.
6. Issues replacement drug/dental cards and vision care forms after confirming entitlement according to legislation and program directives.
7. Receiving, verifying and processing client information in connection with Benefits Requests according to legislation and policy directives.
8. Responding to inquiries from clients, the public and advocacy groups and agencies by: providing explanations based on knowledge of Income Support and ODSP legislation and related programs, accessing reference material and client database, referring complex/unusual matters to appropriate agencies, Income Support Specialists or Income Support Manager.
9. Receiving and actioning changes to client's monthly allowance and personal information such as change of address and personal information, change of worker, update on income changes and accommodation changes.
10. Reviewing and processing monthly reporting update cards as submitted by clients and following up with the client where discrepancies occur.
11. Processing client requests for direct bank deposit; reviewing direct deposit rejects and following up with clients, banks and Financial Services Branch to verify information; tracing recalls and identifying and solving transfer problems whenever possible.
12. Reviewing files, identifying and analyzing discrepancies/errors in the provision of Income Support based on legislation and guidelines; referring more difficult cases (along with recommendations) to Income Support Specialists.
13. Reviewing monthly SDMT Tasks Lists and other relevant reports on a regular basis and follows up by telephone or form letter as required.
14. Reviewing client payment history regarding returned cheques, lost payments, Direct Bank Deposit (DBD) rejects etc. and making recommendations that may impact on their financial eligibility. Conducting retroactive file reviews and budget calculations on active and inactive files for the purpose of calculating and identifying arrears or overpayments and documenting such information on the appropriate form.
15. Summarizing calculations and entitlements to explain level of assistance to recipients including arrears and overpayments Preparing recommendations for approval of special benefits; suspension of case, adding and deleting of beneficiary, etc.

### Knowledge:

Requires knowledge of ODSP Act, regulations, policies and previous and current guidelines in order to provide accurate information, explanation and interpretations to a diverse clientele and others by communicating purpose and interpreting and applying its intent.

Requires knowledge of program and benefit eligibility criteria in order to communicate and apply to recipients circumstances and to support recommendation for benefits. Examples include Community Start-up Benefits, Employment Start-up Benefits, Emergency Repairs, Mandatory Special Necessities, Special Diets, Northern Health Travel Grant, Vision Care, etc.

Working knowledge of other provincial, federal, and municipal programs such as Ontario Works, Canada Pension Plan, Ontario Student Assistance Plan, in order to provide general information and provide appropriate referrals to clients. Knowledge of local community resources such as food banks, housing and support agencies.

Knowledge of overpayment recovery follow-up system and Family Benefits Act in order to respond to enquiries and to determine if there is sufficient information to recommend collection or non-collection to Income Support Specialist.

Working knowledge of capabilities and operation of on-line database (i.e. SDMT) and various windows based computer applications including Word, Excel and electronic mail to enter, update, access and protect information in database, to produce reports, complete forms and produce letters; working knowledge of government intranet.

General knowledge of various financial assets and instruments such as lines of credit, mortgages, bonds, RRSPs, etc. in order to provide information to clients and prepare recommendations for Income Support Specialist re eligibility for benefits.

Awareness of and sensitivity to various client disabilities in order to provide appropriate pro-active service.

Knowledge of branch and program objectives, responsibilities and operations (e.g. regional and local priorities and direction, service standards, internal workflow) to support ministry/branch vision in providing quality customer service in a timely and accurate manner.

#### **Staffing and Licensing Requirements:**

Demonstrated proficiency in keyboarding and ability to work in fully automated environment, utilizing on-line computer databases as well as windows based applications.

#### **Skills:**

Job requires interpersonal skills, including effective listening, self-control, tension-management and interviewing skills as well as research techniques, to elicit information from a diverse clientele, to accurately understand facts, details or issues which may be only partly expressed; to deal effectively with a high volume of clients with disabilities in face-to-face situations and by telephone contact.

Job requires sound judgmental and interpretative skills to determine the nature of the enquiry and needs of the client, based on the information provided, while being sensitive to various client disabilities. Strong interpersonal, analytical and communication skills are required to tailor provision of information, explanations and interpretations for diverse clients.

Job requires analytical skills to assess data on client entitlement and budgetary requirements; identify errors and discrepancies; understand financial statements and perform various mathematical calculations; extract and summarize data in order to prepare recommendations to Income Support Specialist.

Oral communication skills to discuss, clarify, determine client needs and explain Income Support, ODSP guidelines, legislation, procedures and entitlements and how these programs apply to an individual clients situation, and provide general information on other programs such as CPP, Ontario Works. Ability to communicate effectively in writing to respond to enquiries and produce reports. Ability to work in a fully automated environment using on-line database (i.e. SDMT) and various windows based computer applications including Word, Excel and electronic mail to input and access client information on-line and produce reports, forms and letters. Proficiency in keyboarding skills are required to accurately input, access and manipulate client information and manage on-line client files.

Ability to organize and coordinate own work to support the work of the team in meeting deadlines.

Job requires effective interpersonal skills to support team members in achieving team and organizational goals.

#### **Freedom of Action:**

Decision-making is guided by program policies and procedures manuals arising from income support legislation. Work assignments are carried out in conjunction with the income support team under the supervision of the Income Support Manager. Ability to determine when consultation with others is necessary. Ensure client confidentiality in accordance with F.1.P.P.A. Income Support Manager is

consulted in complex/unusual situations that deviate from established guidelines.

Judgement used in determining amount and type of information necessary to both convey and receive from client in order to arrive at a recommendation for benefits.

Job requires choosing legislation that responds to applicants situation/need in order to provide most beneficial solution for which applicant qualifies.