Ontario

ONTARIO PUBLIC SERVICE
CAREERS

Job Specification

Position Title:	CLIENT REPRESENTATIVE ASSISTANT
Job Code:	OPSEU - Office Administration 09, 09OAD
Job ID:	36183

Purpose of Position:
As part of a multi disciplinary team, provides assistance and administrative support to the assigned Client Representatives in the day-to-day and long-term management of the financial affairs and personal care management of vulnerable clients.

Duties/Responsibilities:
35%
1. Initiates and responds to inquiries from clients, care-givers, health-care professionals, legal professionals internal and external, financial institutions, creditors, relatives of clients and other interested parties by:
• Receiving, prioritizing and responding to a high volume of telephone/walk in inquiries and distributing cheques when necessary;
• Determining nature and urgency of enquiry and establishing appropriate level of priority;
• Providing sympathetic and /a tactful liaison with clients, care-givers, relatives, social workers and health care and legal professionals in stressful situations;
• Clarifying and explaining legislation, regulations, policy and procedures of the Public Guardian and Trustee to clients/relatives and other interested parties;
• Resolving client concerns and/or referring to Client Representative or other appropriate staff, coordinating resolution if necessary.
35%
2. Provides financial analysis and control by;
• Analyzing, reviewing and taking appropriate action on discrepancies and accumulated arrears and problems on accounts;
• Creating/reviewing/updating/adjusting/editing and initiating on line "recurring entries" to ensure payments and allowances from various government benefit programs;
• Reviewing overall financial situation of clients; obtaining and verifying data pertaining to • all existing government benefits and/or the possibility of eligibility for benefits available to client(s); securing, applying, rectifying clients social insurance and health insurance number(s);
• Obtaining appropriate documents; making application in accordance with the rules and regulations of Old Age Security, Canada Pension Plan, Quebec Pension Plan, Unemployment Insurance Acts and various health insurance programs;
• Ascertaining and confirming whether treatment and/or drugs are covered under the clients supplementary health plan(s), including the submission of claims for supplementary health and hospital benefits;
• Requesting information from the income tax unit in the clients portfolio on taxable and non-taxable income in order to complete application for additional subsidiary benefit(s) under the provisions of the Old Age Security Act;
• Initiating and preparing on line cash disbursements for expenses (e.g. clothing, bed holding, special allowances) after analyzing clients income, cash balance/expenditures for approval of Client Representative

• Assessing the needs, initiating new allowances and reviewing existing allowances of clients and/or dependants; contacting recipients/care givers to access ongoing needs;
• Identifying potential problems with on-going payments, such as declining cash balances; placing "cash reserve" on clients accounts to prevent debits;
• Conducting periodic reviews of cash balances on hand at various facilities/homes to ensure that funds are being used appropriately;
• Monitoring and determining Personal Needs Allowance/PIN Money/In Trust Account funds to ensure that funds remain at appropriate levels.

25%
3. Utilizing computer mainframe database, provides internal/external research function by:

• Reviewing client files, Data Base and System Reports to obtain pertinent information;
• Corresponding with caregivers, banks, utilities, Government agencies and other interested parties to obtain/provide financial/medical/accommodation information as required;
• Locating and scrutinizing legal documentation such as Wills, Powers of Attorney and particulars of clients financial interest in deceased persons estates/other interests e.g. investments, stocks and Trust Funds;
• Reviewing assets such as land, cottages, bank accounts, motor vehicles to ensure they are recorded appropriately for the benefit of the client; recording miscellaneous assets e.g. wheelchairs;
• Reviewing clients effects in storage to recommend consideration for disposition or continuation to the Client Representative
• Obtaining personal, financial, sociological and/or health data of clients by liaising with health-care professionals, social workers, caregivers, family members, legal professionals, business associates and friends or clients.

5%
4. Other duties as assigned may include:

• Participating in the training of new Client Representative Assistants as required;
• Assisting other Client Representatives Assistants as required (e.g. when on sick leave or vacation)
• Controlling a petty cash account;
• Maintaining keys for client properties;
• Preparing and distributing incoming and outgoing mail;
• Relieving reception/switchboard staff when requested;
• Arranging for maintenance of office equipment;
• As assigned

Knowledge:
Good oral and written communication skills; good interpersonal skills, tact, diplomacy; good judgment and ability to work effectively and diverse groups of clients and staff; good organizational and analytical skills; knowledge of eligibility and application requirements of the Canada Pension Plan, Quebec Pension Plan, Old Age Security, Health Insurance and Unemployment insurance; mathematical skills, initiative, resourcefulness and ability to work independently and as part of a team; ability to work under pressure to meet deadlines of workloads; creativity in dealing with problematic situations; computer literacy, knowledge of mainframe environment and local area network, windows and WordPerfect 6.1 applications; understanding and appreciation of role of the Office of the Public Guardian and Trustee and of related policies, procedures and legislation; working knowledge of the health sector and issues related to vulnerable adults; must exercise judgement in establishing work priorities.

Staffing and Licensing Requirements:
Must have a satisfactory criminal reference check (CPIC).

Skills:
Job requires reasoning and problem solving skills in determining or selecting appropriate administrative procedures and processes when preparing documents, using data base and other software, and responding to or redirecting inquiries based on knowledge of program area operations. Job requires mathematical skills to review and reconcile invoices. Job requires organizational and analytical skills to identify issues and in determining and realigning priorities in response to competing deadlines. Job requires written communication skills to compose routine correspondence in response to requests for information from oral instructions or handwritten notes. Job requires oral and written communications skills to provide information on program area in response to internal and external inquiries, including a diverse group of clients and staff. Job requires interpersonal skills when researching and following up on outstanding issues with other staff, and to work effectively as part of a team.

Freedom of Action:
Job requires working in accordance with ministry directives and guidelines, administrative manuals and established division or government procedures. Job has access to ministry and government administrative policies and procedures such as rules, regulations and practices in determining appropriate format when preparing letters, reports, and charts. Job requires determining what information is confidential and whether or not it should be divulged when responding to inquiries. Work is reviewed for content, grammatical and typographical accuracy. Job requires referring situations or problems outside of established directives or procedures to manager.