

 <p>STATE OF INDIANA CLASSIFICATION SPECIFICATION</p>	Class Title: Client Intake Clerk		Class Code: 003JF3
	FLSA Status: Non-Exempt	Salary Schedule: COMOT 3	Effective Date: 6-7-13
	Summary: Incumbent greets agency customers and clients 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.		

Duties:

- Answers questions from customers, clients and the public about 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;
- Facilitates workshop presentations and administer assessment testing as needed;
- 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;
- 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.
- Verifies completeness and accuracy of forms, records and information and updates records and databases.
- Performs other related duties as required.

Job Requirements:

- Thorough knowledge of division's procedures, policies and practices for processing claims;
- Knowledge of basic grammar usage and style;
- Knowledge of customer service practices;
- Ability to communicate in person and by telephone, computer, email and correspondence;
- Ability to handle difficult or irate individuals and maintain harmonious relationships;
- Ability to adapt quickly to changes in procedures and conditions and to interruptions that disrupt workflow;
- Working knowledge of applicable laws;
- Ability to determine needs of clients through interviewing;
- Ability to effectively present to client the eligibility requirements of a variety of programs;
- Ability to follow oral and written instructions and procedures;
- Ability to deal tactfully with others and to establish and maintain working relationships with local office staff, employers, claimants and the public.

Difficulty of Work:

Incumbent applies established guidelines that are applicable to individual situations. Most guidelines are received in written form, but judgment is required in determining the appropriate guideline or form to be filed. Supervisors are available for technical guidance and completed work is spot-checked for technical accuracy.