



Capital Area Council of Governments Job Description

CAPCOG Title	Information, Referral, and Assistance Specialist	State Title	Customer Service Representative III
Position Number	AAA_23_01	Salary Group	A-13
Reports to	Program Manager for Access & Assistance	Telecommuting Eligibility	Case-by-Case
Division	Aging Services	FLSA Classification	Non-Exempt
Employment Category	Regular-Full Time	Cell Phone Stipend	n/a

GENERAL DESCRIPTION

Performs non-supervisory human services work which requires familiarity with various government benefit and non-profit programs for older adults and their caregivers. Work involves providing persons contacting the Area Agency on Aging of the Capital Area (AAACAP) with intake, conducting effective assessment of individual needs, providing referrals to AAA services and community resources, and data entry into prescribed consumer tracking software systems. May coordinate services with other agencies and internal/external service providers. Work requires the employee to respond professionally, with sensitivity and timeliness and accuracy to questions from older adults, caregivers, providers and the general public. May train others. Works under moderate supervision with moderate latitude for the use of initiative and independent judgment.

ESSENTIAL FUNCTIONS

Essential duties and functions may include the following. Other related duties may be assigned.

- Answers incoming calls and e-mails to the AAACAP information, referral, and assistance (IRA) lines. Ensures calls and e-mails are answered at a rate commensurate with agency standards and contract requirements.
- Assists with walk-in or appointment clients seeking AAACAP assistance.
- Conducts person-centered consumer assessments and referrals to preproperate resources and benefits by screening and assessing consumer needs, providing technical assistance on programs and services, and providing descriptions of community services available to consumers and referrals to partner agencies. Continues on-going follow-up as needed or requested.
- Assists clients with understanding available AAACAP programs and makes formal referrals to AAACAP programs as appropriate.
- Documents information, referral, assistance contacts, intakes, and screens accurately and timely per agency standards. Assists in preparing reports based on the data entered in the appropriate database.
- Maintains and updates community resources and data system providing current and accurate information regarding services for the AAACAP target population.
- Responsible
- Documents outreach activities as per agency requirements.
- Participates in required trainings and meetings.
- Assists with surveys to help determine level of satisfaction with programs and services.
- Support outreach for AAACAP programs and provide presentations occasionally to community and professional groups to coordinate, improve, and stimulate interest in the AAACAP and support partner agencies.

- Support media events promoting AAACAP activities, including TV, radio, photography, recordings, and social media.
- Assists in the development of program policies and procedures.
- Supports on-the-job training of other staff and volunteers.

GENERAL QUALIFICATIONS

Experience and education may be substituted for one another.

Experience Required

- Minimum of one year of experience working within a consumer assistance field or social services field required.
- Ability to use MS Office products required.

Education Required

- Graduation from a standard senior high school or equivalent required.

Preferred

- Bachelor’s degree in a human service field preferred.
- At least one year of experience in providing phone and/or direct social services assistance to consumers preferred.
- Ability to use consumer data tracking software preferred.
- Experience serving older adults and/or caregivers preferred.
- Bilingual (English and Spanish) highly preferred

Certifications

- None required to apply.

Knowledge, Skills, and Abilities

- Knowledge of customer service standards.
- Knowledge of social services customer support standards and consumer needs assessment.
- Skills in the use of standard office equipment and software, including by not limited to MS Office products and shared database systems.
- Skills in effective oral and written communications, especially consumer support and documentation.
- Skills in working with vulnerable adults and persons in high-stress situations.
- Ability to maintain consumer confidentiality and adhere to federal, state, and agency regulations.
- Ability to provide for accurate and completed data records on consumer database system while speaking to consumers.
- Ability to develop and maintain positive relationships with social service professionals to support consumer access to services.

Other Requirements

- Must obtain Alliance of Information and Referral Systems (AIRS) Community Resource Specialist, Aging/Disability (CRS A/D) certification within three years of hire date.

Requirement	% of Time
Remain in a stationary position at a desk throughout the workday.	90-100%
Stand and perform tasks throughout the workday. May be stationary for periods of the day.	90-100%

Requirement	% of Time
Move about inside the office to perform different tasks of the position such as access the copy machine, file papers, or deliver mail to the reception area.	60-90%
Coordinate precise movements of the fingers in order to use office productivity machinery or perform intricate tasks.	90-100%
Move objects weighing up to designated # of pounds.	0-30%
Lift objects from the floor and up onto a shelf or desk weighing up to designated # of pounds.	0-30%
Converse with others both in person and over the phone.	90-100%
View details at close range (within one to two feet of the observer) and distinguish color-coded materials.	60-90%
Move body into multiple positions to perform different tasks such as in the following examples: under desks, between walls, around servers and furniture, or to retrieve files from the bottom or top drawers of file cabinets.	0-30%
Performs duties in professional office environment.	90-100%
Performs duties while exposed to conditions of heat, cold, humidity, wind and/or rain.	0-30%
Drives a vehicle to perform CAPCOG business.	0-30%