

Central Coast Energy Services

Job Description



Title: Intake & Eligibility Worker I / II / III
Reports To: Director of Program Services
FLSA Status: Non-Exempt
Salary: \$20.00 - \$31.00 per hour – Depending on Experience
Status: Full time/Regular

General Duties and Responsibilities:

To perform a variety of customer service and office support functions related to the activities, operations, and programs of the agency including customer assistance, clerical, and office related functions.

Intake Eligibility Worker I: Employees in this classification receive general supervision within a framework of well-defined policies and procedures. This job class performs a variety of repetitive or closely related duties according to established procedures including the processing and maintenance of customer records, assisting customers and responding to inquiries, computer data input, and program activity support.

Intake Eligibility Worker II: Employees in this classification receive general supervision within a framework of standard policies and procedures. This job class requires knowledge of program policies and procedures. Employees must be capable of making decisions within a limited number of alternatives in solving standard problems.

Intake Eligibility Worker III: Employees in this classification receive limited supervision within a framework of standard policies and procedures. This job class requires the ability to interpret policies and procedures and apply independent problem solving and decision-making.

All CCES employees must:

- Work safely and take responsibility for a safe and healthy workplace (on and off site).
- Contribute to the accomplishment and continual refinement of the mission and goals of Central Coast Energy Services.
- Support each member of the Central Coast Energy Services team in the efficient delivery of quality service.
- Train others to become productive members of the Central Coast Energy Services team.
- Be dedicated to the compassionate service of those in need.
- Maintain confidentiality of customer information and personnel matters.

Specific Duties and Responsibilities:

- Receive and route telephone calls, respond to customer inquiries, and provide program information.
- Assist customers with filling out forms.
- Process customer applications and determine eligibility.
- Make mathematical calculations and verify data accuracy.
- Compose general correspondence.
- Input data into computer.
- Make appointments with customers and maintain appointment schedules.
- Receive, open, sort, and distribute incoming mail; prepare outgoing mail.
- Typing, filing, and record keeping.

- Visit satellite sites for customer service.
- Conduct off-site outreach and intake activities
- Complete outreach and marketing calls
- Conduct customer education and energy conservation counseling
- Receive invoices, verify accuracy, and prepare check requests.
- Purchase supplies and services and maintain vendor accounts.
- Perform other related general office and clerical tasks.
- Operate a variety of standard office equipment including personal computer, printer, copier, fax machine, calculator, and postage machine.
- Train other employees and volunteers.
- Translate written materials.
- Clean and maintain offices and storage areas as required.
- Work evening or weekends as needed.
- Other duties as assigned.

Skills and Minimum Qualifications:

- Bilingual and bi-literate in Spanish required.
- Good organizational skills and attention to detail.
- Excellent customer service skills
- Ability to follow instructions (oral and written).
- Ability to perform mathematical calculations using addition, subtraction, division, multiplication, and percentages.
- Ability to operate office equipment (multi-line phone, calculator, photocopiers, fax, postage machine) quickly and accurately.
- Ability to type 40 wpm from clear copy.
- Ability to learn rules, methods, policies and procedures of the workplace.
- Proficient in MS Office Suite (Word, Excel, Outlook).
- Ability to communicate effectively (oral and written).
- Ability to work cooperatively with others and maintain effective work relationships with all those contacted in the course of performing required duties.
- Commitment to the goal of empowerment of low income persons of all ages and backgrounds to attain the skills, knowledge, and opportunities needed to become self sufficient and to advocate for themselves and others.
- Ability to work productively under close supervision.
- Punctual and reliable

Minimum Computer Proficiency Skills:

- Microsoft Word
- Microsoft Excel
- Microsoft Windows XP Operating System
- Microsoft Access
- Microsoft Outlook

Central Coast Energy Services reserves the right to verify skill proficiency through testing on any of the above referenced categories and any other skills and knowledge required by the position applying for.

Training and Experience:

Any combination of training and experience, which would provide the required skills and minimum qualifications, is qualifying. A typical way to obtain these skills would be:

- A minimum of 12 months work experience performing duties comparable to that of an Intake Eligibility Worker I With Central Coast Energy Services
- AA/AS degree in business or equivalent preferred

Skills and Training for STEP Progression

Intake & Eligibility Worker II: (In addition to the above standards for I&E Worker I)

Skills and Minimum Qualifications:

- Ability to interpret, apply, and explain the procedures, precedents, and policies of program operations.
- Perform the tasks assigned with speed and accuracy.
- Ability to work productively under general supervision.

Training and Experience

- A minimum of 12 months work experience performing duties comparable to that of an Intake Eligibility Worker I with Central Coast Energy Services.
- Completion of approved training in Windows operating system and word processing.

Intake & Eligibility Worker III: (In addition to the above standards for I&E Worker II)

Skills and Minimum Qualifications:

- Ability to assist in supervision of office operations and staff.
- Demonstrated ability to perform special projects and assignments above and beyond daily tasks.
- Demonstrated ability to complete special projects and assignments at an acceptable level with minimal supervision.
- Demonstrated ability to compose clear and concise correspondence and written instructions/procedures.
- Ability to work productively under minimal supervision.

Training and Experience

- A minimum of 12 months work experience performing duties comparable to that of an Intake Eligibility Worker I with Central Coast Energy Services.
- Completion of training and proficiency in Excel spreadsheet and Access database (general knowledge and use)

License Requirements:

Possession of an appropriate driver's license; vehicle insurance, and a good driving record.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to use hands to finger, handle, or feel and talk or hear. The employee is frequently required to sit. The employee is occasionally required to stand; walk; reach with hands and arms; climb or balance and stoop. The employee will occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include Close vision, Distance vision, Peripheral vision, Depth perception and ability to adjust focus.

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required by their supervisor.

All applicants invited to interviews will be required to provide a DMV Driver's License Record Printout dated within the previous 30 days.

All qualified applicants will receive consideration for employment without regard to race, color, religion, national origin, ancestry, disability, medical condition (cancer related), marital status, sex, sexual orientation, age (over 40), veteran status or any other merit factor unrelated to job duties.

An Affirmative Action/Equal Opportunity Employer