

## **CLIENT SERVICES SPECIALIST**

### **MAJOR FUNCTION**

This is a professional and analytical position that is responsible for reviewing and processing applications for the various housing, community and/or indigent care programs administered through the Community Services Department. The primary purpose is to analyze the applicants' financial position to determine income eligibility. Secondary is to determine program specific eligibility criteria such as; mortgage loan feasibility.

Position includes speaking to groups and contacting organizations to market programs and services.

### **ESSENTIAL FUNCTIONS**

The following statements describe the principal functions of this job and its scope of responsibility, but should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including working in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload.

- Analyzes applications for various assistance programs, working with clients to obtain all information and verification required to determine the client's total financial picture in order to approve or "certify" the client's household income according to grant guidelines and approve/deny applicant's eligibility for the program.
- Counsels clients on steps to improve issues that may hinder eligibility and refers clients to appropriate community resources for additional assistance.
- Explains eligibility criteria to applicants and other agencies and assists them with completing applications via phone or in person. Assists applicants on a daily basis with requirements of program, documentation, and hypothetical questions.
- Primary processing includes calculating income, verifying assets, performing property and public record searches, determining eligibility according to individual program regulations and maintaining database files.
- May prepare loan documents, mortgages and coordinate closing with lenders, title companies, clients, builders, realtors, and finance.
- Maintains accurate individual applicant loan files with current verified financial information, recertifying the information as needed for compliance and assessing each client's situation to determine the best funding solutions and documentation to request.
- Requires thorough knowledge and understanding of current HIPAA regulations.
- Maintains and prepares accurate, financial and statistical data and caseload reports for budgeting purposes, submission to regulatory boards and outside agencies and for preparation of annual grant reports.
- Assists with gathering, compiling and analyzing information on program related issues for preparation of required planning documents and budgets.
- Required to report to work at the appointed hour, as scheduled, and to work the entire

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assigned schedule.

### **SECONDARY FUNCTIONS**

- Performs other duties as assigned.

### **CUSTOMER SERVICE**

This is a front-line position for providing excellent customer service to members of the general public and other County employees. Personal contact occurs with other employees of the unit, employees of other departments in the County, citizens, and customers of the department. Service is provided in person and by phone contact.

### **SUPERVISION**

May review the work product of others. Provides guidance, advice, and assistance to others on work assignments. Provides work direction.

### **EDUCATION, EXPERIENCE, LICENSES, AND CERTIFICATIONS**

#### **Education and Experience**

Bachelors Degree or equivalent from a four-year college or technical school; with two years related grant experience or training and demonstrated computer literacy for word processing and spreadsheet applications; greater years of experience may substitute for a portion of the required education; or any equivalent combination of education, training and experience.

#### **Licenses**

Possession of a valid Florida Drivers License.

#### **Certifications.**

Must be a notary public or ability to attain within six months. Will be required to attend and successfully complete grant/technical training related to work load.

### **JOB SKILLS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements are representative of the required knowledge, skills, and abilities.

#### **Language Skills**

- Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or government regulations.
- Ability to write reports, business correspondence, and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

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- Ability to effectively present information to top management, public groups, and/or boards.

### **Mathematical Skills**

- Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume.
- Ability to perform percentage calculations to determine Combined Loan to Value, PITI as % of total income and % debt to income.
- Ability to read and analyze a HUD statement.

### **Problem Solving Abilities**

- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.
- Ability to interpret a variety of instructions in written, oral, diagram, or schedule form.
- Interprets complex and detailed technical data.
- May participate in development of policy, programs, plans, or procedures.

### **Specialized Skills and Abilities**

- Knowledge of the theory, principles, and practices of public administration. Knowledge of government organization and administration and of the legal basis of government.
- Knowledge of research techniques, methods, and practices. Ability to conduct research, analyze, and interpret findings and to prepare clear and concise reports.
- Ability to speak clearly and effectively in public. Ability to deal courteously and tactfully with members of the public and coworkers.
- Ability to establish and maintain effective relationships with government officials, employees, the public, and the press.
- Ability to plan and organize and meet multiple deadlines. Must be flexible to work on diversified projects at a fast pace.
- Ability to use various computer software to obtain statistical data.
- Ability to remain calm in stressful situations.
- Ability to take a teamwork approach to the job by cooperating with others, offering to help others when needed, and considering larger organization or team goals rather than individual concerns. Includes the ability to build a constructive team spirit where team members are committed to the goals and objectives of the team.

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### **Machines and Equipment**

This employee will be required to operate a computer, calculator, telephone, fax machine, copy machine, and other general office equipment in the completion of the tasks of the position.

### **PHYSICAL DEMANDS**

While performing the duties of this job, the employee is regularly required to stand, walk, taste or smell, and lift up to 25 pounds. The employee is frequently required to stoop, kneel, and crouch or crawl. The employee is occasionally required to sit, use hand to finger, handle or feel, reach with hands and arms, and talk or hear.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. While performing the duties of this job, the employee will occasionally be required to be exposed to outdoor weather conditions. The typical noise level for this environment is moderate. May be asked to work occasional evenings or weekends.

Established: 06/2009

Pay Grade: 11

Job Description Number: 5151

Category: 5

Status: N/E

Revised: 05/2012