

JOB DESCRIPTION

JOB TITLE: *Client Retention Assistant (9798)*

Job Summary:

The job of the Client Retention Assistant is for the purpose of assisting A Ticket to Success staff in collecting earnings verification on clients, updating electronic data files, tracking data using spreadsheets, along with other related clerical duties.

Essential Job Functions:

- Assist management and coworkers with collecting earnings verification on clients enrolled in the A Ticket to Success program
- Process (receive, sort, distribute) mail or incoming faxed documents to appropriate person for timely and accurate distribution.
- Scan documents and add to electronic case file
- Update spreadsheets and electronic case files with earnings information received.
- Maintain Outlook and SharePoint calendars, files, and records to ensure efficient operations.
- Operate computer to maintain electronic case files and database with timely updates
- Organize work and sets priorities to ensure that all tasks are completed accurately with attention to detail and within required time lines.
- Maintain confidentiality of personal identifiable information for all clients. This includes all forms of communication with clients or others
- Contact clients by phone or email if needed to request status update
- Answer phones and greet visitors. Refer to the appropriate person for assistance or follow up.
- Assist with typing letters, reports, flyers, and assist with surveys.

Skills, Knowledge and/or Abilities Required:

Skills to:

- Operate computer and
- Communicate effectively both verbally and in writing, bilingual in Spanish is preferred.

Knowledge of:

- Microsoft Office programs: Excel, Word, Access, and Outlook;
- English word usage, spelling, grammar, and punctuation;
- Social Security Administration's Ticket to Work program and terminology is preferred;
- Office and records management;
- Proper telephone techniques to provide quality customer service and
- Electronic filing methods.

Ability to:

- Operate computers to enter data, update, create correspondence and retrieve information;
- Use electronic calendars, store and retrieve documents and other basic word processing, spreadsheet and data base applications (preferably Microsoft Word, Excel and Access);

- Perform clerical work using independent judgement, initiative and required accuracy and speed;
- Maintain cooperative relationships with those contacted in the course of work;
- Communicate, effectively, by telephone, email, and in person with individuals and groups of varying educational and socioeconomic backgrounds;
- Organize work, establish priorities and remain flexible to changes in the workload and deadlines and
- Travel in and out of county using own vehicle.

Education Required:

- High school diploma or the equivalent.

Licenses, Certifications, Bonding, and/or Testing Required:

- Valid California driver's license
- Department of Justice and FBI Fingerprint Response
- Must pass a Federal Government High-level Security Clearance

FLSA: Non-Exempt

January 2018

This organization is an Equal Opportunity Employer and does not discriminate on the basis of race, color, national origin, creed, age, gender or disability. Inquiries regarding compliance procedures may be directed to our personnel office.

This organization complies with the Americans with Disabilities Act. Persons with a disability who may need some accommodation in the hiring process should contact our personnel office.

This organization is a Drug and Tobacco - Free Workplace.

This organization requires a successful candidate to provide it with employment eligibility and verification of a legal right to work in the United States in compliance with the Immigration Reform and Control Act.