

## **AGING SERVICES ACCOUNT CLERK SPECIALIST**

**Distinguishing Features of the Class:** The work involves providing a wide variety of supportive services to the elderly in the areas of outreach, information and referral as well as moderately difficult clerical work involving independent performance of financial account and record keeping tasks. The work may require decision making as to methods to be used and classification of records and accounts. Another responsibility of the position is to complete an assessment of the client, by looking at the person's health history, current health, home environment, medications, and the client's ability to perform activities of daily living to determine if needs are met or unmet. With the client's approval referrals are then made to agencies that can address the unmet needs that were identified. The incumbent conducts a follow-up to determine if the client is satisfied with the program. Cases requiring more intensive services are referred to appropriate agencies. Incumbents in this class must have an understanding of and empathy for the characteristics, needs and problems of the elderly. The work is performed under the direct supervision of an Director of the Office for the Aging. Does related work as required.

### **Typical Work Activities:**

- Assists clients over the phone, or when they come into the office, on any concern they may have which may include answering questions or providing referrals regarding insurance, social security, or any care-giving issues.
- Reviews a variety of more complex financial documents, classifies them and distributes items into a variety of accounts according to prescribed procedures and policies, and makes journal entries;
- Interviews elderly persons or their delegates via telephone or in person to identify their needs and evaluate them for program services offered by Office for the Aging.
- Provides information to the elderly concerning resources and agencies available to help resolve their difficulties
- Posts figures to appropriate accounts, makes all necessary adjustments in balances and verifies and reconciles balances, renews status of accounts as adjustments are made and takes appropriate action as authorizing payment, issuing checks or preparing bills;
- Tracks audits and monitors a variety of accounts, verifies adjustments made to correct allocations and issues reports as required;
- Operates word processor, personal computer or terminal and typewriter in preparing and generating account records;
- Does more complex payroll transactions and prepares all related reports;
- Prepares funds for deposit into book accounts;
- Reconciles accounts and prepares reports from information;
- Provides outreach services in order to identify elderly persons in need of services and to increase participation in nutrition programs and other programs offered.
- Oversees services for the client and avoids duplication of services by acting as a liaison between involved community agencies.
- Maintains accurate and current records on a computer regarding client contacts and activities including on-going narrative files for each client, and daily and monthly numerical reports.
- Trains and directs the work of volunteers.
- Attends staff meetings and conferences to learn about various services.
- Initiates contacts with various agencies or health care providers to present programs and schedules programs and attends as the representative of Office for the Aging representative.

**Aging Services Account Clerk Specialist continued****Full Performance Knowledge, Skills, Abilities and Personal Characteristics:**

- Good knowledge of the characteristics, needs and interests of the elderly.
- Good knowledge of community agencies, facilities and services which can be utilized to aid the elderly.
- Good knowledge of interviewing techniques and methods.
- Good knowledge of modern methods used in keeping and checking financial records and accounts;
- Good knowledge of office terminology, procedures, equipment and business English;
- Working knowledge of demographic make-up of the area served by the Office for the Aging as it relates to the elderly.
- Ability to make more difficult arithmetic computations involving fractions, decimals and percentage accurately;
- Ability to analyze and organize data and prepare records and reports;
- Ability to operate a computer to enter and retrieve data.
- Ability to communicate effectively both orally and in writing.
- Ability to relate to and motivate older people
- Ability to direct and evaluate the work of others.
- Sensitivity to individual and cultural differences.
- Initiative
- Patience
- Tact
- Physical condition commensurate with the demands of the position

**Minimum Qualifications:**

- (A) An Associate's degree from a regionally accredited or New York State registered college or university with a minimum of twelve (12) credits in psychology, sociology, gerontology or a closely related field, which would prepare an individual for effectively dealing with or responding to elderly people and one (1) year experience in human services and one (1) year of experience maintaining financial accounts and records ; **OR**
- (B) Graduation from high school or possession of a GED and Two (2) years experience in human services, preferably aging related and two (2) year of experience maintaining financial accounts and records.

03/23/12

CLASS:       COMPETITIVE