

**SECRETARY OF STATE
CLASSIFICATION
SPECIFICATION**

CLASSIFICATION SERIES: Customer Service Assistant	SERIES NO.: 6443S
MAJOR AGENCIES: Secretary of State Only	EFFECTIVE DATE: 01/10/2000

SERIES PURPOSE:

The purpose of the customer service occupation is to respond to inquiries, requests and/or complaints received in writing and/or by e-mail, telephone, facsimile, in person and/or other means of communication.

At the first level, incumbents sort inquiries, respond to general-nature inquiries and utilize office microfilm/microfiche equipment/systems in order to view and retrieve documents requested by the public.

At the second level, incumbents respond to technical issues and customer inquiries, assist customers with filing and document acceptance procedures, handle payments received from transactions and complete applicable records and documentation for acceptance of cash, checks and credit card payments. Create work batches of business filings, assign the work level and service type to the batch, update the status of filings into the computer system meeting established deadlines and guidelines for quality and productivity. Handle any and all duties normally performed by lower-level customer service assistants during their absence, peak periods or as requested.

Note: The classification is restricted for use by the Secretary of State only.

CLASS TITLE: Customer Service Assistant 1

CLASS NUMBER: 64431S

CLASS CONCEPT:

The entry level class works under general direction and requires considerable knowledge of office practices & procedures and state &/or federal laws, rules, policies, legal interpretations & procedures governing operations of the Office of the Ohio Secretary of State in order to provide assistance & information to individuals in response to general requests & inquiries.

CLASS TITLE: Customer Service Assistant 2

CLASS NUMBER: 64432S

CLASS CONCEPT:

The advanced level class works under general direction and requires thorough knowledge of office practices & procedures and state &/or federal laws, rules, policies, legal interpretations & procedures governing operations of the Office of the Ohio Secretary of State in order to provide assistance & information to individuals in response to general requests & inquiries and provide assistance in resolving problems, questions and complaints. Handles cash received from transactions and completes applicable records and documentation for acceptance of cash, checks and credit card payments in compliance with office accounting procedures. Creates and updates work batches of filings. Closes the work reports for the end-of-the-day closing and balancing of receipt of all funds and associated documents reconciling all items. Meets established deadlines and guidelines for quality and productivity

CLASS TITLE: Customer Service Assistant 1	CLASS NUMBER: 64431S	BARGAINING UNIT: 40
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JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Receive correspondence from the office mailroom, sort correspondence by general type of service required (i.e. UCC, Corporate; Expedite, Regular) to be performed on behalf of the customer; open and stamp checks and documents; identify the level of filing and sort as appropriate for further processing; research status of filings and customer inquiries; access the computer system to produce the copies of the completed (approved) certificates; provide customer service in the efficient and accurate preparation of documents submitted to be filed by the Business Services Division of the Secretary of State's Office; meet established deadlines and guidelines for quality and productivity.

Respond to general nature office correspondence; retrieve/record, research and respond to voicemail messages from office telecommunications system; retrieve, research and respond to electronic mail and facsimile customer inquiries; access the data management system in order to produce records to respond to general routine written correspondence.

Utilize office microfilm/microfiche equipment/systems in order to view and retrieve documents requested by the public; retrieve archive files in order to reproduce copies of documents filings and related information submitted to the office that have been requested; meets established deadlines and guidelines for quality and productivity.

MAJOR WORKER CHARACTERISTICS:

Knowledge of agency policies & procedures*; public relations. Skill in Word Processing (e.g., pc terminal); Equipment Operation (e.g., fax, photocopier, microfilm machine). Ability to gather, collate & classify information about data, people or things, deal with many variables & determine recommended specific course of action, move fingers easily to perform manual functions repeatedly & screen mail; deal with problems involving several variables within familiar context, use proper research methods in gathering data & handle routine inquiries & contact with public, business officials &/or co-workers.

(*) Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

3 mos. trg. or 3 mos. exp. in office practices & procedures; 1 course or 3 mos. exp. in public relations or customer service to include techniques for dealing with difficult people; 1 course or 3 mos. exp. in typing, keyboarding, data entry or word processing; 1 course or 3 mos. exp. in operation of personal computer.

-Or equivalent of Minimum Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.

CLASS TITLE: Customer Service Assistant 2	CLASS NUMBER: 64432S	BARGAINING UNIT: 40
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JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Responsible for utilization of quality customer service techniques in order to respond to technical issues and customer inquiries (including law firm and service company representatives) regarding filing of documents by the Business Services Division of the Ohio Secretary of State; directs customers and/or other agency staff or management regarding filing requirements by explaining applicable laws policies and regulations; determines document compliance with statutory guidelines and determines whether documents should be accepted or rejected; Updates and enters filing information into the agency document management computer system based upon the type of filing and compliance with the appropriate business rules; responds to questions and complaints associated with agency procedures and guidelines; Meets established deadlines and guidelines for quality and productivity.

Conducts searches of the computer system in order to assist customers with filing and document acceptance procedures; Creates certificates of good standing transactions based on customer requests; Handles cash received from transactions and completes applicable records and documentation for acceptance of cash, checks and credit card payments in compliance with office accounting procedures; Performs transactions via the teller system in order to properly record information to be reported to the finance division; Offers assistance to customers with routine computer and software issues as well as the Secretary of State internal system operation as they arise which effects the customer's ability to use the computer systems provided for public access or in handling customer service inquiries.

Creates work batches of filings to be reviewed for acceptance or rejection based upon the agency guidelines for submission into the database (Corporate/UCC). Assigns the work level and service type to the batch; Makes inquiries into the computer system in order to determine the status of filings (i.e. in-process, hold, completed); Updates batch information to complete the processing day; Completes a Quality Control review of specified fields to determine accuracy of customer information (i.e. certificate, check and address information); balances the receipt of funds and number of pages to be imaged associated with closing the batches and complies with office accounting procedures associated with the processing of payments made by cash, check or credit card; prepares documents for the Imaging process; Closes the work reports for the end-of-the-day closing and balancing of receipt of all funds and associated documents so that all items are reconciled; Meets established deadlines and guidelines for quality and productivity.

Handles any and all duties normally performed by lower-level customer service assistants during their absence, peak periods or as requested. Responds to customer inquiries regarding state election laws and particular voter registration requirements; Provides documents and information to those persons who apply for ministerial licensing and foreign certification of documents (apostilles). Performs other duties as requested.

MAJOR WORKER CHARACTERISTICS:

Knowledge of agency policies & procedures; English grammar & composition, public relations and maintaining systematic records of financial transactions, verification and balancing of data. Skill in word processing (e.g., pc terminal) and equipment operation (e.g., fax, photocopier). Ability to deal with problems involving several variables within familiar context; use proper research methods in gathering data; gather, collate & classify information about data, people or things; deal with many variables & determine recommended specific course of action; handle sensitive & routine inquiries from & contact with public, business officials &/or clients; move fingers easily to perform manual functions repeatedly; understand internet software system count, do basic addition and subtraction, & read & record figures accurately.

(*) Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

9 mos. trg. or 9 mos. exp. in office practices & procedures; 9 mos. trg. or 9 mos. exp. in public relations or customer service that included techniques for handling difficult people; 9 mos. trg. or 9 mos. exp. in typing, keyboarding, data entry or word processing; 9 mos. trg. or 9 mos. exp. in operation of personal computer.

-Or equivalent of Minimum Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.