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Contact Representative Series

GS-0962

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SERIES DEFINITION

This series includes positions that primarily involve personal contacts with the public for the purpose of (1) providing information on rights, benefits, privileges, or obligations under a body of law; (2) explaining pertinent legal provisions, regulations, and related administrative practices and their application to specific cases; and (3) assisting individuals in developing needed evidence and preparing required documents, or in resolving errors, delays, or other problems in obtaining benefits or fulfilling obligations. The work requires (1) a high degree of skill in oral communication; and (2) a good working knowledge of, and ability to apply governing laws, regulations, precedents, and agency procedures, but less than the degree of legal training equivalent to that represented by graduation from a recognized law school.

This standard supersedes the series definition for the Contact Representative Series, GS-962, published March 1957, and amended February 1960, and the single-agency classification standard for the "Veterans Benefits" Specialization of the Contact Representative Series, GS-962.

EXCLUSIONS

1. Positions that involve primarily receptionist duties (i.e., receiving visitors or callers and providing general information on agency functions or referring inquiries to appropriate personnel) or positions that involve answering inquiries primarily through correspondence. Such positions are classified in the [Information Receptionist Series, GS-304](#), the [Correspondence Clerk Series, GS-309](#), or other appropriate clerical series.
2. Positions that involve clerical processing, development, and examination of applications or claims; providing information on procedures for filing such documents; and answering general or routine questions. Such positions are classified in the [Legal Instruments Examining Series, GS-963](#), or the [Claims Clerical Series, GS-998](#).
3. Positions that involve quasi-legal work in examining, adjudicating, and authorizing applications or claims. Such positions are classified in the appropriate examining series (e.g., the [Passport and Visa Examining Series, GS-967](#), or the [Veterans Claims Examining Series, GS-996](#)), or other appropriate series (e.g., the [Immigration Inspection Series, GS-1816](#)).
4. Positions that involve providing information to the public as only one of several functions performed concerning the administration of the Federal social security, old age, survivors, disability, and health insurance programs. Such positions are classified in the [Social Insurance Administration Series, GS-105](#).
5. Positions that apply knowledge of rights, benefits, privileges, or obligations under Federal laws and that include public contacts but which are primarily of a professional, investigative, enforcement, or similar nature. Such positions are classified in the appropriate subject-matter

or functional series since their primary purpose is not concerned with explaining agency programs to the public and assisting individuals affected by the program.

OCCUPATIONAL INFORMATION

Contact representative positions are found in agencies that administer programs involving benefits (e.g., pensions), privileges (e.g., naturalization), or obligations (e.g., taxes) that affect a large segment of the general public. Frequently, the individuals affected by such programs are unaware or have only a very general understanding of specific benefits, privileges, or obligations.

Contact representatives provide information and assistance to the public when the nature of the programs administered and the complexity of the laws, regulations, and related administrative practices involve a broad range and volume of inquiries that cannot be answered routinely. This arises from such factors as:

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- frequent legislative changes, or legal or administrative determinations, affecting coverage, requirements, benefits, etc.;
- numerous special provisions or conditions that apply to different persons under varying circumstances; and
- optional election of special provisions or from among duplicate or overlapping benefits, privileges, or obligations.

These complexities require substantial development of information on individual circumstances, good knowledge of a complex body of legal and regulatory provisions, and ability to explain options and varying provisions or conditions that apply to individual cases. The presence of these complicating factors distinguishes the work of contact representatives from that performed by other employees (e.g., claims clerks) who answer routine inquiries involving the application of more clearly defined and applicable criteria.

Contact representatives deal with a wide range of individuals who have varying degrees of understanding of the agency program (i.e., ranging from individuals who are semi-literate and confused about what the agency offers or needs to professional people who are highly knowledgeable in the field). Often they must work with individuals who have difficulty in presenting their problems and understanding explanations because of age, physical disability, limited knowledge of English, emotional stress, or other factors that impede effective communications. The contact representative must be adaptable and highly skilled in oral communication to overcome such problems and to assure understanding, often under the pressure created by many people waiting for assistance.

The primary purpose of contact representative work is to respond to a variety of personal or telephone inquiries. Contact representatives provide sufficient information to enable individuals to determine the required or most appropriate actions to take to obtain benefits or privileges, to comply with reporting and disclosure requirements, or to fulfill other obligations under Federal laws or regulations. In addition, contact representatives normally:

- explain, or assist in preparing, the forms and documents needed to meet reporting requirements or to support claims or application for benefits;
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- explain the administrative and legal recourses open to the individual and the proper procedures for filing a complaint alleging violation of applicable law or regulations, or for appealing a determination made by the agency;
 - explain administrative procedures and normal processing times;
 - follow up on or expedite action on pending cases;
 - initiate action to resolve discrepancies and adjust agency records that may be incomplete or erroneous;
 - explain the application of regulatory provisions and the bases for agency determinations in individual cases; and
 - write necessary correspondence and narrative reports of contacts.

Contact representatives may also:

- contact other agencies, employers, schools, or other organizations or individuals to obtain or verify information needed for agency determinations;
- provide basic information on related Federal, State, or local programs;
- contact various civic, veterans, or other organizations, news media, etc., to explain and publicize agency programs; or
- contact other agencies, businesses, civic groups or similar organizations to obtain voluntary compliance with or participation in agency programs.

Relationship with Other Occupations

Many kinds of positions in Federal agencies involve contact with the public for purposes of answering questions and providing information but are not contact representative positions. For example:

- Telephone operators and information receptionists are trained to give information on where to go and whom to call to get answers to particular kinds of questions regarding the program of benefits, services, or obligations administered by the agency.

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! This involves questioning callers and visitors sufficiently to determine the subject-matter category or their inquiries.

- Clerical support employees of various types are trained to review applications for benefits, claim forms, tax forms, and related documents for completeness and consistency and to give information to individuals regarding filing and processing requirements.

- ! This requires knowledge of procedural requirements and how to get applications, forms, or files ready for consideration by action offices.

Contact representatives provide these types of procedural information, but go beyond it and focus on the substance of the inquiries that come to them and on the circumstances behind them. They advise individuals on the merits of their cases and on the decisions that are likely to be made regarding their claims or applications for benefits or their obligations to report facts to the agency. Thus, contact representative work requires a greater depth of knowledge concerning the agency program of benefits, services, or obligations and the regulations and precedents regarding granting, withholding, waiving, or otherwise acting on individual cases. For these reasons, this standard does not apply to positions of information clerks, telephone operators, or similar types of positions.

TITLES

The authorized titles for this occupation are:

- *Contact Representative*, and
- *Supervisory Contact Representative*.

CLASSIFICATION OF SUPERVISORY POSITIONS

This standard provides guidelines for classifying nonsupervisory contact representative positions. The [General Schedule Supervisory Guide](#) should be used to classify supervisory positions in this occupation.

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CLASSIFICATION FACTORS

The significant grade distinguishing criteria in this occupation have been grouped into two factors of *Nature of Contacts* and *Level of Responsibility*.

1. *Nature of contacts* covers (a) the scope and complexity of the program on which information is provided and the technical knowledges required, (b) the degree of development and analysis of information required to answer inquiries or resolve problems, (c) the extent of counseling and assistance provided to individuals, and (d) the nature and extent of contacts with other organizations.
At the lower levels, contacts involve answering specific inquiries from basic program knowledges or standard reference material. At higher levels, contacts involve substantial counseling and assistance to individuals or contacts with varied organizations, news media, etc., to explain and obtain voluntary compliance with or participation in agency programs.
2. *Level of responsibility* covers (a) the nature of guidelines applied; (b) the degree of judgment, initiative, persuasiveness, or ingenuity required; and (c) the nature of supervisory and administrative controls over the work of the contact representative.

At the higher levels, assignments require substantial judgment in applying extensive guidelines and in counseling individuals; initiative and ingenuity in adapting approaches to communicate with a wide variety of people. Supervisory controls range from close observation and review of work at training and developmental levels to periodic quality control checks and general review of results achieved at higher levels.

KNOWLEDGES, SKILLS AND ABILITIES REQUIRED

The kinds and levels of knowledges, skills, and abilities required are not treated separately in the grade-level descriptions since they are reflected in the discussion of other classification factors.

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Basic requirements for this occupation include:

- Knowledge of the agency program on which the contact representative is providing information;
- A high degree of skill in oral communication;
- Ability to comprehend and explain to others numerous quasi-legal guidelines;
- Adaptability; poise; tact; and objectivity.

Some positions also require writing ability and skill in making oral presentations to groups.

NOTES TO USERS

1. Training positions are described in this standard only at grade GS-4. Each grade level above GS-4 is described in terms of normal working assignments and the normal type of supervisory direction that is typical of the level.

At any grade level, there may be employees who are being trained for work at higher grade levels, as well as employees who are directly performing work typical of that level on a continuing basis. Such developmental assignments, by comparison with the next higher grade level toward which they are pointed, may be restricted as to the nature of the contacts involved, or the level of responsibility, or in both respects.

2. Selected examples of benefits, services, or obligations under certain agency programs are used in this standard to illustrate kinds of contact situations typical of particular grade levels. Agency programs differ greatly with respect to the range and variety of benefits, services, or obligations involved; the philosophy of management, organization, and work assignment practices; and other key elements that influence the difficulty and responsibility of the contacts involved. Thus, some agency programs and work situations do not have contact work of the scope, complexity, or level of responsibility as described at the higher levels in this standard. For these reasons, contact representative positions are to be classified in terms of the total context of duties and responsibilities and not by means of an automatic application

of agency program characteristics alone, or by mechanical comparison with the illustrative examples alone.

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3. This standard provides specific grade-level criteria for non-supervisory contact representative positions in grades GS-4 through GS-10. Individual nonsupervisory positions may warrant consideration for classification at a grade above the top level normally appropriate under this standard for the contact program of exceptional range and diversity when the duties and responsibilities clearly exceed that level. Such positions are so highly individualized that it is not practicable to establish specific criteria to evaluate them; they can be evaluated by comparison with the grade-level criteria in this standard and in related standards.

For example, a contact representative position that involves full responsibility for success of an agency contact program of the type described in this standard at the GS-10 level throughout a geographic area may warrant consideration for classification above that level. As indicated at that level, this type of program involves an exceptional range and diversity of benefits and services and a special representational role on behalf of the persons served by the program. Contact positions in programs that do not involve this range and diversity of benefits and services, the special responsibility to represent the interests of groups served, and the area-wide program responsibility are not likely to justify classification above the levels described.

4. Assignment to a duty station, or performance of work at locations away from the contact office is not, in itself, a grade determining factor. In many such cases, the actual duties performed and the level of responsibility are substantially the same as those of an employee in a contact office. Assistance is available, where needed, from other personnel assigned to the duty station or from the contact office by telephone on the same types of problems as would be referred to the supervisor if the employee were in the office with the supervisor. Remoteness from the supervisor is significant only when the duties and responsibilities of the employee are substantially enhanced or restricted because of the location in which the work is performed.

GRADE-LEVEL CRITERIA

CONTACT REPRESENTATIVE, GS-0962-04

Nature of contacts

The GS-4 level includes trainee contact representatives who receive instruction; study informational, procedural, and regulatory material; and observe and discuss contacts conducted by experienced contact representatives. Assignments are designed to provide basic knowledges of the program involved, the organization and functions of the agency, and effective contact techniques.

The trainee, under close supervision, meets with the public in situations in which there is opportunity to review guidelines and discuss his understanding of regulations before providing information on inquiries (e.g., taking telephone inquiries and arranging to call back with the information requested). Employees may also provide straightforward factual information on the preparation of forms or similar matters, referring substantive questions to more experienced contact representatives.

Level of responsibility

The trainee's work is closely observed by the supervisor or a more experienced contact representative who is immediately available for assistance and explanation on any problem encountered. The supervisor frequently discusses the employee's progress to judge the degree of his understanding and to guide the employee in developing further knowledges. As training progresses employees may answer recurring questions without assistance, exercising judgment on the need to refer or discuss such questions with more experienced contact representatives.

CONTACT REPRESENTATIVE, GS-0962-05

Nature of contacts

GS-5 contact representatives complete contacts involving selected issues of limited difficulty with the expectation they will demonstrate the capacity to complete contact assignments that are typical of higher grade levels. In comparison with the GS-4 training level where work is closely controlled, GS-5 contact representatives independently complete contacts that involve questions on which they have received adequate training or which are clearly covered by guidelines or by clear-cut, established procedures. This involves:

- Determining whether the inquirer meets requirements for approval of benefits when this can be verified by referring to documents that are readily available, e.g., date of birth, certificate of service.
- Explaining current criteria for benefits or obligations that apply directly to the individual.
- Reviewing basic guidelines and regulations to determine the specific provisions that are applicable to each case.
- Reviewing records presented by individual or contacting designated sources within the agency to determine the status of the individual's case, time span expected for processing the case, etc.
- Initiating action to trace missing documents or records, to enter additional information into the individual's records, to correct discrepancies in records, etc.

Level of responsibility

Employees at the GS-5 level apply guidelines that usually are directly applicable to the contacts and are readily interpreted. Normally, these guidelines include informational material that is designed for public use (e.g., instructions on forms, information in pamphlets), or agency manuals that are written in a comparable manner. They receive training on the application and interpretation of more complex guidelines involving laws, regulations, legal definitions or precedents, and similar material.

GS-5 contact representatives work in situations where assistance is readily available. They are expected to obtain guidance on problems and inquiries that are beyond the scope of their training. They exercise judgment on the need to consult more experienced employees on specific inquiries. GS-4 employees, by comparison, work under continuing close supervision.

The supervisor evaluates the work of the GS-5 employee and reviews his progress through discussion of the problems he refers to the supervisor for help, frequent monitoring of the contacts he conducts, and review of any written work products (correspondence, applications or other forms, and reports.) As GS-5 employees sharpen their contact skills, the degree of monitoring and assistance is gradually reduced.

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CONTACT REPRESENTATIVE, GS-0962-06

Nature of contacts

GS-6 employees complete contacts (i.e., conduct personal or telephone interviews, search records or guidelines to determine answers or resolve problems, and provide full explanations in response to specific inquiries) relating to agency programs that involve the following characteristics:

- A body of law and regulations that:

- ! covers one or two distinct types of benefits or obligations;
- ! is relatively stable in basic coverage and requirements, but includes amendments or precedent decisions that affect specific provisions.

The GS-6 employee must be able to explain the impact of such changes on the way criteria are applied, or the way specific benefits or obligations are computed.

- Criteria that must be interpreted in light of individual circumstances or that include several qualifying conditions that may affect the individual's status. Such criteria require the GS-6 employee to:

- ! question the individual or his representative to obtain information needed to establish his status under the program or needed to compute the benefit or obligation that applies.

EXAMPLE:

An unemployment insurance program that requires determinations of "availability for work" and "reasonable effort" to find work in light of such factors as:

- current labor market in the area;
- reason for leaving last job;
- previous work history;
- education or special skills;
- physical condition.

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- ! go beyond the specific inquiry by explaining conditions or actions (e.g., change in marital status, residence, source of income) that could affect the individual's status or change the benefits or obligations due, and by explaining the individual's responsibility for reporting such changes.
- Problems that are resolved through established procedures for:
 - ! reviewing records or contacting other units to learn:
 - the status of pending actions;
 - reasons for delays or changes, such as recomputation of a benefit or obligation;
 - what action or additional information is required to resolve the case.
 - ! tracing missing documents;
 - ! entering new information or corrections into the individual's record;
 - ! contacting other agencies or organizations to request:
 - expedited action on a case (e.g., a claim submitted to an insurance carrier under the Medicare program);
 - information from their records required to support a case (e.g., certification or verification of "full-time student" status).

- ! explaining to the individual such matters as:
 - extended processing time on cases;
 - the need for supporting documents that may be difficult or expensive to obtain;
 - delays or recomputations that result from discrepancies or omissions in the information provided by the individual, or his representative.

Level of responsibility

At the GS-6 level, contact representatives provide direct responses to specific inquiries regarding the program of benefits, services, or obligations administered by the agency. This involves applying procedural guidelines to individual cases and interpreting the effect of such precedents as:

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- legal rulings,
- decisions on earlier cases rendered by courts or by administrative bodies,
- rules, regulations, digests of key decisions.

The supervisor explains the application of new decisions and rulings in general terms. GS-6 contact representatives use judgment in determining the effect of such rulings on individual situations. Typically, GS-6 contact representatives seek help from the supervisor:

- when individuals question their interpretation of the application of guidelines to their cases,
- when individuals question agency decisions or rulings on their cases,
- when the contact representatives are unable to identify the reasons for actions taken by the agency, errors that appear in the individual's records, or delays in processing cases, or to determine appropriate corrective actions to take.

The supervisor reviews the work of GS-6 contact representatives through general observation and periodic monitoring of contacts, review of written work products, and discussion of problems observed or the kinds of problems they refer to the supervisor for assistance.

CONTACT REPRESENTATIVE, GS-0962-07

Nature of contacts

GS-7 contact representatives complete contacts relating to agency programs that involve the following characteristics:

- Agency administers variety of benefits or obligations that are closely related.
 - ! Individuals may meet any of numerous qualifying conditions or special provisions that affect their benefits or obligations.

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EXAMPLES:

Following are examples of a few types of programs that illustrate these features:

- Programs to regulate entry to the country, involving several categories of alien status, residence provisions, or travel status that may be applied to individuals.
- Programs to assess and collect individual income taxes involving exemptions, deductions, and exclusions that may apply in determining individual taxes.
- Programs to provide retirement annuities involving several categories of eligibility and options regarding survivor benefits, or alternative methods of computing payments and credits.
- Programs of health insurance that involve several types of eligibility requirements, exclusion of certain diseases or conditions, and different levels of benefits for some conditions as compared with others.
- Benefits and obligations affecting people served by agency frequently change in significant ways.
 - ! Major changes in amount of benefits or obligations and methods of determining them in individual cases.
 - ! Coverage changes to include people not formerly included; or exclude people formerly covered.
 - ! Thus, GS-7 contact representatives must be aware of different schedules of benefits and obligations that applied in the past in order to advise individuals.
 - GS-7 contact representatives often apply superseded legal provisions to some classes of people served or to actions that occurred in different time periods.

The mixture of benefits, deadlines, reporting requirements, exemptions, and optional choices that apply to individuals who are affected by programs of the type outlined above, requires GS-7 contact representatives to give more consideration to alternatives and special circumstances than is typical at the GS-6 level. They evaluate the nature of each inquiry and the way it is presented so they can provide information that is appropriate to the unique circumstances of each individual. GS-7 contact representatives:

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- Question the individual to evaluate the extent of his knowledge of the options and choices open to him or of the requirements placed on him by laws and regulations.
- Help the individual to outline his situation and the reasons for his inquiry.
- Explain the benefit options, coverages, qualifying conditions, or reporting requirements that apply to the individual.
- Help the individual to evaluate alternatives open to him, the advantages and disadvantages of each, and to reach decisions.
- Make special contacts with other offices to help the individual, such as:
 - ! special contacts with action units to expedite hardship cases;
 - ! special contacts with other agencies, institutions, or employers to verify supporting information regarding the individual or his case.

GS-7 contact representatives must:

- Know the functions of organizations that deal with matters that are closely related to the program of the agency.

EXAMPLE:

Responsibility of consular offices for issuing visas as it relates to the responsibility of immigration offices to act on visa petitions.

- Reconstruct actions taken by others under rules that change over periods of time by analyzing material in files, transcripts of earlier actions, and similar records.
- Explain adverse agency actions that:
 - ! involve serious consequences to the individual;
 - ! require substantial judgment to isolate the primary considerations behind the agency's unfavorable decision;
- ! require ability to identify and explain those regulatory provisions that pertain to the special conditions and circumstances of the individual's case.

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EXAMPLES:

- Assessment of additional taxes and penalties.
- Denial of request to change alien status.
- Reduction of annuity payments.
- Discontinuation of survivor's benefits or educational benefits.
- Denial of claim for maternity benefits under health insurance plan.

Level of responsibility

In relation to the range of benefits, obligations, options, and regulatory requirements typical of this level, GS-7 contact representatives go beyond providing specific information in response to specific questions. GS-7 employees help the individual to understand the full range of alternatives open to him under the agency program of benefits or obligations so he can decide on a course of action, and to contact other action offices to aid the individual in resolving problems. Thus, work at the GS-7 level requires greater judgment and resourcefulness in developing a different approach or line of questioning for each unique contact situation.

When an individual is adversely affected by agency decisions, GS-7 contact representatives are responsible for discussing the action with the individual and helping him to develop alternative plans. Such individuals are often highly upset. GS-7 contact representatives must be especially tactful, restrained, but firm in reconstructing the facts and explaining the basis for the agency decision. They explain the individual's rights to appeal and help him to assess the factors relating to the likelihood of success in an appeal.

Agency programs of benefits or obligations typical of this level are subject to major adjustments through legislation. The supervisor provides instruction on substantial changes that affect broad categories of people under the agency program and on ways to treat cases that are influenced by such key changes. GS-7 contact representatives use judgment in interpreting these legislative changes in determining the benefits or obligations of the individuals who contact them.

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GS-7 contact representatives normally complete contacts involving interpretation of the benefits or obligations typical of this level without assistance. Usually, but not necessarily, the supervisor is available to give help in resolving exceptionally complex problems, e.g., contacts with persons who are so upset or distraught they will not deal with employees below the supervisory level. The supervisor reviews the work of GS-7 contact representatives in the same manner as at grade GS-6, through observation of contacts, review of written products, and discussion of the kinds of problems the employees bring to his attention.

CONTACT REPRESENTATIVE, GS-0962-08

Nature of contacts

Contacts at this level relate to a wider range of benefits, services, and obligation than at grade GS-7. GS-8 contact representatives have to review the particular circumstances and goals of each individual (e.g., his work status, health conditions, retirement plans, etc.) in order to apply the combination of benefits, services, or regulatory requirements that will best meet his needs over a span of time. At this level, the contact representatives take more responsibility for assuring the outcome of agency actions in relation to the individual's goals than at lower levels.

At the GS-8 level, the types of contacts and individual problems involved may be found in a number of agency programs but are more likely to center in programs that have the following characteristics:

- Agency administers or contact representatives deal with greater variety of benefits or obligations than at grade GS-7.

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EXAMPLES:

Retirement program that involves a variety of survivors' benefits, supplemental annuity benefits, disability retirement benefits.

OR

Health insurance program to cover costs of illness coupled with sick pay insurance benefits to provide income during periods of disability.

OR

Unemployment compensation program coupled with job placement and referral service.

OR

- Tax collection program involving individual income taxes, including full range of exemptions, deductions, exclusions, coupled with business taxes involving different types of exemptions, deductions, exclusions, capital gains taxes, gift taxes, excise taxes, employment taxes, and others.
- Many of the benefits or services administered by the agency overlap, duplicate, or supplement similar services administered by other agencies.
 - Under each agency program, there are different eligibility requirements, conditions, exclusions, reporting requirements, or other regulatory provisions that significantly affect and complicate the specific benefits or obligations involved.

EXAMPLES:

- Availability of alternative ways of crediting some types of service (e.g., military service, service before a specified time, service involving wages above or below a specified amount);
 - Alternative formulas for computing benefits with offsetting advantages and disadvantages;
 - Possibility of transfer of credits from one program to another;
 - Possibility of waiving certain benefits in order to meet income limitations or dual compensation restrictions;
 - Optional elections of effective dates based on various age and service combinations, additional protection or survivor benefits, different payment plans, and similar matters.
- Thus, GS-8 contact representatives must:
- ! estimate and compare benefits or obligations that would apply to the individual under each program; and
 - ! advise the individual on all aspects that should be considered in deciding the most advantageous action, including such matters as those listed above;
 - ! help the individual to focus on his goals and to weigh, and select from, alternative courses of action.

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EXAMPLE:

Comparing options, benefits, and advising individuals whether to retire under a retirement and insurance program that provides minimum guaranteed benefits that are based on the level of social security benefits but are independent of social security, and encompassing a range of options and choices such as:

- retirement annuities that are based on different age and service combinations and that have differing spouse and survivor benefits;
- disability annuities for both total or occupational disability; and
- supplemental annuities, health insurance, unemployment insurance, or other related benefits.

- ! Elicit information about the individual's situation and status under different programs from a number of sources in addition to the individual, e.g.:
- employers, past and present
 - schools and training institutions
 - insurance firms
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- doctors and health officials
 - local and State tax offices
 - banks and other financial institutions
 - contact or action offices of other Federal agencies.

Because of the diversity of benefits or obligations, regulatory requirements, options and alternatives involved at the GS-8 level, contact representatives at this level must go further than at GS-7 in reviewing the preferences, career goals, and status of individuals (e.g., personal financial situation, marital status, dependency, etc.). This involves use of sophisticated interview techniques in reviewing the individual's circumstances and goals and advising on the most advantageous ways to meet them.

EXAMPLE:

Advising on tax liability and probable assessment of taxes in cases involving elements such as:

- varied sources of income, including self-employment;
- itemized personal and business expense deductions including most of the categories of allowable deductions;
- carryover of capital losses and investment credit from prior years; and
- several issues requiring reference to the tax code and precedents to explain why certain items were disallowed.

Contact situations at this level are more sensitive than at GS-7 because they include responsibility for:

- Eliciting sensitive, personal information (e.g., marital problems, questionable divorces, questions of legitimacy) or draw out information the individual may attempt to withhold (e.g., additional sources of income, overpayments under various benefit programs);
- Reporting personal observations and judgments concerning such controversial matters as the apparent extent of physical or mental disability, or the degree to which an individual understood his responsibilities and whether errors in his records reflected honest mistakes or fraudulent intent;

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- Contacting relatives or neighbors, employers, public and private institutions, or searching a variety of records to ascertain or verify information on family relationships, periods of employment, types and amount of compensation, financial condition, or similar matters required to resolve issues or to prevent or prove fraudulent actions.

Level of responsibility

The GS-8 level involves more responsibility than the GS-7 level for assuring that action by the agencies concerned with the individual is based on full understanding of the individual's situation, plans, and goals. GS-8 employees are responsible for contacting all action offices involved, in their agency and in other agencies, to:

- Explain the individual's total plan or situation;
- Outline the action that each office involved can take regarding its portion of the individual's situation and how it fits in with action by other offices;
- Clear away administrative difficulties that may impede timely action on the individual's case.

When GS-8 contact representatives advise an individual whose application for benefits or services has been denied, their responsibility goes beyond that of the GS-7 employee and includes:

- Contacting action offices to explore the reasons for adverse decisions, the possibilities of reconsideration, whether there are grounds for appeal;
- Interviewing the individual to draw out additional information that could affect the agency decision;
- Advising the individual on presenting relevant points effectively;
- Explaining agency determinations in situations where it is difficult to gain understanding or acceptance, such as:
 - ! Decisions that are not clearly covered by regulations but are based on analogies to situations covered by precedents;
 - ! Decisions that are not clear because the factors on which the decisions rest are not identified.

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GS-8 contact representatives operate substantially without supervisory direction or control in their day-to-day contact work. The supervisor, or a technical specialist, is available or can be contacted to give advice on particularly controversial cases, and the employees discuss with the supervisor those cases and inquiries that may require special investigation or may set new precedents. On other inquiries and problems of the type outlined above, GS-8 employees are responsible for completing contacts independently, including the review of complex records, reconstruction of involved transactions, analysis of precedent decisions and administrative rulings, and application of guidelines for programs of other agencies that offer parallel or overlapping benefits or service.

The supervisor periodically monitors contacts and spot checks written work of GS-8 employees. Reports and recommendations concerning such matters as fraudulent intent, or inability to repay overpayments, are reviewed in detail for adequate documentation and justification of the recommended action. The supervisor evaluates the work of GS-8 employees through general observation of effectiveness, spot check review of accuracy and completeness, and any complaints or recommendations received.

CONTACT REPRESENTATIVE, GS-0962-09

Nature of contacts

GS-9 contact representatives counsel with individuals regarding a broader range of career, financial, health, education and other goals, both short term and long range, than at grade GS-8. Contacts at the GS-9 level involve comprehensive programs of benefits, services, or obligations in which the philosophy of management and the intent of Congress is for the agency to take extra steps to assure that benefits are used. Thus, GS-9 contact representatives are required to take positive action to motivate individuals and to act as advocates for them in their dealings with organizations that affect their cases. GS-9 contact representatives complete contacts relating to agency programs that involve the following characteristics:

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- Agency administers a wide variety of distinct types of benefits, each with a different set of regulations.

EXAMPLE:

educational assistance
and
job training and placement services
and
vocational and educational counseling
and
insured or direct loans to buy houses
and
complete life insurance coverage
and
pensions and survivor benefits
and
compensation for disability
and
medical care and mental health care
and
other benefits

- Persons are entitled to some or all of the benefits and services based on previous service during particular time periods, or on relationship to a person who served (e.g., spouse, widow, orphaned son or daughter, etc.).
- Particular benefits or services involved overlap or supplement similar benefits or services provided, to one degree or another, by other Federal, State, or local welfare and service organizations.

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This array of benefits and services, each with separate eligibility requirements and regulatory provisions, exceeds the complexity of agency programs at the GS-8 level because it involves all of the following characteristics:

- Need to choose among a range of benefits provided by different agencies.

EXAMPLE:

various options under military retirement pay vs. combinations of options under veterans compensation plans that supplement or replace military retirement benefits

- Need to choose among related benefits offered by the agency.

EXAMPLE:

different forms of educational and job training assistance available through GI Bill, War Orphans Act, vocational rehabilitation provisions

- Need to choose among wider range of options.

EXAMPLE:

wide variety of life insurance conversion plans and settlement options

- Need to meet different time limitations on eligibility for different benefits.

EXAMPLE:

legal cut-off dates on educational assistance, housing loans, insurance, etc.

Thus, in serving individuals, GS-9 contact representatives must:

- Assess the economic needs of each individual at various points in time (e.g., needs for income, health care, education, job, housing, old age assistance, etc., at particular stages in the individual's life) and the alternative ways to meet them, through services offered by his agency or by other agencies.
- Assure that individuals are given full information so they can take full advantage of benefits or services to which they are entitled from the agency or from other agencies.

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This type of total advisory service is performed in relation to the spectrum of benefits and services that is involved at this level.

For example, the GS-9 contact representative must:

- Review the individual's total situation and goals.
- Help him to determine:
 - ! which of several benefits and options are available and most valuable immediately;
 - ! future plans that may require other services and what actions are necessary to establish eligibility;

- ! the best combinations of benefits and services from a number of agencies that will contribute to the individual's plans and needs.
- Attempt to overcome apathy or negative attitudes toward:
 - ! using benefits and services immediately available under law;
 - ! getting involved in programs that go beyond his immediate needs, and making use of benefits that the laws and regulations intended (e.g., vocational rehabilitation, job training, educational assistance).
- In counseling persons regarding benefits provided by laws, the GS-9 contact representative applies seasoned judgment and perception in:
 - ! estimating the individual's receptivity to attempts to persuade him;
 - ! adjusting the timing and manner of approach to avoid building up resistance;
 - ! exploring the problems or attitudes that may be holding the individual back;
 - ! illustrating concrete ways in which the individual can improve his circumstances or achieve goals he desires;
 - ! recommending and arranging for professional counseling or social services available within the agency;
- ! discussing personal problems that mitigate against using benefits (e.g., housing problems, need for supplemental income, need for child care, etc.);
- ! advising on sources of assistance available under other Federal, State or local programs, and, as appropriate, contacting representatives of such agencies to request assistance for the individual.

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Level of responsibility

The type of program involved at this level requires GS-9 contact representatives to engage in a stronger representational role on behalf of the individual that goes well beyond providing advisory service. GS-9 contact representatives act as advocates of individuals involved in their dealings with all organizations that affect their plans. They assure that the individual gets all of the services and benefits he needs to meet his goals, from a variety of sources. This representational aspect is not part of the everyday operations of many programs because of differences in program philosophy and congressional intent.

In those programs in which this type of service is expected, GS-9 employees go beyond a strict service role by:

- Reviewing the individual's circumstances for conditions that could increase benefits or restore lapsed benefits, and initiating action to claim such benefits;
- Reviewing agency determinations on applications for benefits to assure that all pertinent information was available and properly considered
 - ! If it appears the individual did not receive the full benefits to which he appears to be entitled, the GS-9 employee contacts the action office to request reconsideration.
- On request, representing the individual in presenting appeals at agency hearings.

In addition to the guidelines applied at the GS-8 level, agency policy on assisting individuals requires GS-9 employees to develop and apply a knowledge of Federal, State, and local social services available in the community to help individuals with problems that are beyond the scope of the agency programs. GS-9 employees go beyond advising applicants on such social services and take positive action to contact community agencies on behalf of the individual to obtain assistance for the individual on personal problems that hinder his use of agency benefits. GS-9 employees must also apply sound judgment, ingenuity, and persuasiveness in motivating apathetic or negatively inclined individuals to use benefits for which they have not applied.

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GS-9 employees are expected to complete contacts of the complexity outlined above without supervisory assistance. However, they may consult the supervisor on questionable awards or adverse determinations before contacting action offices of the agency to request reconsideration. The supervisor evaluates the work performance of GS-9 contact representatives through periodic quality control type checks of records and contact effectiveness and through review of complaints or recommendations received.

CONTACT REPRESENTATIVE, GS-0962-10

Nature of contacts

GS-10 contact representatives are responsible for establishing continuing cooperative relationships with other agencies, organizations, news media, and institutions. The purposes of these contacts are:

- To provide the framework within which contacts with individuals served in the area can be carried out effectively.
- To assure that persons served by the agency receive a wide diversity of benefits and services appropriate to their situations and circumstances.

GS-10 employees normally carry out these public relations and community service contacts in communities near major facilities of the agency, such as a hospital or other service center. Contacts of this type relate to agency programs of comprehensive benefits and services in which the philosophy of management and the intent of Congress is for the agency to take whatever steps are necessary to assure that individuals get all of the services and benefits that are appropriate to help them meet their goals and needs.

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Benefits and services involved at this level include education, vocational training, employment, housing, insurance, health care, mental health care, support in old age and serious illness, and other areas. Where an agency program does not involve this range and diversity of benefits and services, the special responsibility to represent the interests of individuals served, and this kind of responsibility to establish key organizational contacts, the contact representative positions are not likely to warrant classification at this level.

GS-10 employees may also counsel with individuals regarding their specific goals, needs, and plans, as at grade GS-9; but the distinguishing feature of GS-10 contact representative positions is responsibility for public relations and program coordination contacts with key organizations and institutions to enlist their cooperation in achieving the goals of the agency program. Thus, GS-10 contact representatives:

- Meet with business leaders, school officials, hospital administrators, officers of professional societies, labor union leaders, officers of community service clubs, spokesmen of community action groups, journalists and editors, or other community leaders. The purpose of these contacts is to:
 - ! explore the potential for participation by the organization in one or more phases of the agency program (e.g., job placement and training for disabled or disadvantaged individuals, aid in caring for ill or mentally ill persons);
 - ! explain agency program requirements and assist the organization in meeting them;
 - ! discuss results and resolve problems stemming from earlier cooperation and encourage the organization to continue or expand its participation;
 - ! develop opportunities to spread information regarding the agency program of benefits and services through media that will reach persons who need them.

- Establish working relationships with representatives of other Federal, State, and local agencies providing services and benefits that supplement those of the agency. The purpose of these contacts is to:
 - ! exchange current information on program coverage and specific benefits or services available from the respective agencies;
 - ! establish procedures for referring individuals from one agency to another for appropriate assistance;
 - ! explore the possibility of granting preference to individuals referred by the agency;
 - ! within basic agreements negotiated at higher levels, develop procedures for joint sponsorship or participation in special publicity or contact programs or similar cooperative ventures;
 - ! agree on methods to overcome problems of overlap, duplication, or conflict that occur in providing services to individuals served jointly by the programs.

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Level of responsibility

GS-10 contact representatives carry a significant responsibility for making the kinds of contacts that will establish conditions for successful contacts with individuals in assigned communities. This level of responsibility exceeds that of GS-9 contact representatives who advise individuals within the framework of the agency program as established in their areas. Work at this level, by comparison with grade GS-9, requires additional knowledge and understanding of:

- Economic and social problems within particular communities (e.g., population characteristics and trends, employment trends, educational patterns, age and health patterns, housing problems, welfare needs, etc.).

- Goals, resources, and structure of agencies, institutions, and organizations that can contribute to solving community social problems (e.g., social welfare, health care, and educational institutions; volunteer and charitable organizations; news and public information media, etc.).
- Ways to organize coordinated efforts of various agencies in an area toward mutual objectives (e.g., through local health and welfare councils, joint conferences, meetings to focus on specific community problems, etc.).

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In relation to agency programs that involve a diverse range of services and a strong representational role for the groups of people affected, GS-10 contact representatives work independently in establishing cooperative relationships with agencies, institutions, and organizations. However, they do not typically have overall responsibility for success of their agency programs within an area.

The supervisor may accompany GS-10 contact representatives when they contact agencies or organizations that are particularly sensitive or critical to success of the agency program. In these contacts, the role of the supervisor is chiefly to demonstrate agency support and concern for the work of the GS-10 employees in building cooperative arrangements.

GS-10 contact representatives report on their work in terms of overall results, particular problems encountered, and plans for future operations in an area. The supervisor reviews their work in terms of overall effectiveness, adequacy of coverage of contact services provided by the employees, general trends and emphasis of the program as carried out by these employees.