

JOB DESCRIPTION

Position Title: Customer Service Representative I
Department: Pension and Annuity Department
FLSA: Non Exempt
Reports to: Pension and Annuity Department Supervisor

Description

Responsible for providing customer service to plan participants, trustees, and fund professionals for the pension and annuity funds, following the rules and regulations of the plans.

Skills / Knowledge Requirements

- Type 45 WPM
- Computer literate in Word, Excel, and other Microsoft applications
- Proficient in Math
- Good Communication Skills
- Good Telephone Etiquette
- Ability to Multi-Task
- Good Organizational Skills
- High School Diploma or GED
- Customer Service experience (1 year or equivalent)

Duties

- Service participants with fund inquires by phone, mail, or walk-ins
 - Complete estimation letters
 - Mail out estimation letters
 - Mail out income verification letters
- Service fund professionals and trustees with inquires
- File maintenance for plan participants
 - Update addresses
 - Update participant's demographics
- Prepare files for processors
 - Maintain status report and update as needed
 - Review incoming benefit applications
 - Review documents and follow up as needed
 - Request employment verification
- Sort and process incoming mail
 - Prepare and submit retiree changes
 - Route mail on a daily basis
- Annual affidavit processing
 - Maintain and update list
 - Request follow up as necessary

Other Duties

- Projects as assigned by department supervisor
- Assist processors with certified mail return receipt
- Assist with lunchroom cleaning as assigned
- Assist with receptionist relief as assigned

Physical Demands

- Lifting and carrying file boxes within the office
- Shift and adjust file cabinet drawers as needed

Working Conditions

- Indoors, air-conditioned office.

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Work Shift

- Monday to Friday 8:30 AM – 4:30 PM, 1-hour unpaid lunch
- The duties assigned may involve situations that may require over time

Accepted By: _____
Employee's Signature Date

The above information on this description has been designed to indicate the general nature and level of work performed by an employee in this classification. It is not to be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications of employees assigned to this job. Management has the right to add to, revise, or delete information in this description. Reasonable accommodations will be made to enable qualified individuals with disabilities to perform the essential functions of this position.