JOB DESCRIPTION

Position Title: Customer Service Representative I
Department: Pension and Annuity Department
FLSA: Non-Exempt
Reports to: Pension and Annuity Department Supervisor
Salary: $17.00/hour

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

<u>Working Conditions</u>
- Indoors, air-conditioned office.

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

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