

JOB DESCRIPTION

Job Title: Member Service Associate – (onsite)
Department: Operations
Reports To: Operations Supervisor
FLSA Status: Non-Exempt

SUMMARY

In the Operations Department a Member Service Associate assists our members with initial claims calls, assists with the processing and acceptance of applications for new certificates; answers incoming telephone calls, completes daily tasks efficiently. May also assist other departments with various special projects including administrative and research tasks.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following:

(Other duties may be assigned.)

- Compete daily tasks ask required in the processes and procedures of the member services desk.
- Share basic policy information to members.
- Assist the claims department with payment of benefits.
- Assists members with initial death claim calls.
- Assists with the assembling new member certificates or contracts for new business
- Assists with incoming mail and scan/file in the benefit claim folders
- Utilize salesforce to track phone messages, emails and correspondence with all members.
- Assist and provide backup for mailroom services.
- Perform special projects as requested by various departments.
- Annual education of Life Insurance classes to keep up with industry changes
- Maintain effective communication and working relationships with all employees.
- Any additional duties will be assigned as proficiencies increase in current role.

SUPERVISORY RESPONSIBILITIES

None

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Demonstrated Customer Service skills.
- Must have exceptional organization and time management skills.
- Knowledge of Office 365
- Knowledge of Salesforce or Customer Relationship Management software
- English/Spanish Bi-Lingual helpful but not required
- Demonstrated administrative skills including filing and data entry

EDUCATION AND/OR EXPERIENCE

- High School Diploma or equivalent
- 2+ years of Customer Service Experience in a professional environment
- 1+ years of Insurance Industry experience is helpful but not required.
- Maintain Life Insurance license

COMMUNICATION SKILLS

Ability to read and analyze certificates and policy documents. Ability to respond to common inquiries or complaints from members.

MATHEMATICAL SKILLS

Ability to calculate simple math figures and amounts such as discounts, interest, and percentages.

REASONING ABILITY

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

COMPUTER SKILLS

To perform this job successfully, an individual should have knowledge of Word Processing and Spreadsheet software such as Word and Excel.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear.
- Employee may occasionally be required to lift and/or move up to 15 lbs.
- Specific vision abilities required by this job include close vision and distance vision.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is in a typical office environment.
- The noise level in the work environment is usually moderate.
- Expected to perform responsibilities in a consistent, professional manner while exercising strong verbal, interpersonal and quality service skills.
- Work at all times to enhance and strengthen the relationship between the client/member and the organization.

Employee Signature: _____ Date: _____