

## MEMBER SERVICE REPRESENTATIVE SERIES

<u>Code No.</u>	<u>Class Title</u>	<u>Occ. Area</u>	<u>Work Area</u>	<u>Prob. Period</u>	<u>Effective Date</u>	<u>Last Action</u>
4819	Member Service Representative I	02	352	6 mo.	08/15/09	Rev.
4820	Member Service Representative II	02	352	6 mo.	08/15/09	Rev.
4821	Member Service Representative III	02	352	6 mo.	08/15/09	Rev.
4842	Member Service Representative IV	03	352	6 mo.	08/15/09	Rev.

### *Promotional Line: 346*

#### Series Narrative

Employees in this series provide customer related services and interfaces with members, employer representatives, member contacts, and agencies affiliated with a retirement system. The employees, both as individuals and members of a team, are responsible for providing customer services to members of a retirement system in person, by mail, telephone, or other forms of electronic media. The primary focus of positions in this series is to educate members regarding member eligibility as well as initiating benefits upon member request.

#### DESCRIPTIONS OF LEVELS OF WORK

#### **Level I: Member Service Representative I** **4819**

Employees in this class are entry level representatives who receive training on policies, procedures, and systems and provide entry level customer related services. The employees work under direct team supervision.

A Member Service Representative I typically –

1. participates in extensive training on retirement system policies, procedures, and systems.
2. provides current policies and procedures to members, annuitants, beneficiaries, and employer representatives verbally and in written form.
3. initiates appropriate request forms for members who request benefit payments.
4. updates members demographics on computer database.
5. performs routine calculation of refunds.
6. participates as a active member of a regional and process team(s) by attending meetings and offering ideas, solutions, and feedback.
7. performs other related duties as assigned.

#### **Level II: Member Service Representative II** **4820**

Employees at this level provide standard to detailed customer related services. They work under general team supervision, independently in most situations but with assistance when needed.

A Member Service Representative II typically –

1. communicates with members, annuitants, beneficiaries, and employer representatives policies, procedures, and legal rulings in regard to all types of benefit execution.

2. accurately initiates, calculates, and verifies all types of routine benefit payment requests and refunds, including the calculation and/or verification of computer calculation of simple and complex claims.
3. updates members demographics on computer database, assures data is correct, and complies with existing standards.
4. plans, coordinates, and/or participates in presentation of training and educational programs for retirement system staff.
5. participates and/or lends direction to team meetings, including facilitating process team meetings.
6. performs other related duties as assigned.

**Level III: Member Service Representative III****4821**

Employees at this level are senior representatives who provide special assistance and advanced customer related services, as well as train, motivate, and facilitate teams and individual team members. They work under direction from a designated supervisor.

A Member Service Representative III typically –

1. interprets and communicates retirement system policies and legal rulings to staff, members, annuitants, agencies, and other parties.
2. personally counsels one-on-one with participants, annuitants, and/or agency representatives regarding specific retirement system benefits and/or policies.
3. works to resolve sensitive operations and personnel issues with agencies and members.
4. calculates and issues unique, sensitive, or highly complex benefit payments.
5. audits other benefit calculations and calculation systems to assure consistency in conformity to policy and law.
6. creates informational/educational materials and delivers training to external retirement system agencies, groups, and/or members.
7. creates and analyzes reports, diagnoses problems, and initiates actions to correct, revise, and/or improve organizational efficiency and effectiveness.
8. oversees interviews and evaluations of team members.
9. facilitates regional and process teams.
10. performs other related duties as assigned.

**Level IV: Member Service Representative IV****4842**

Employees at this level are experts in their fields. Their duties are highly specialized and/or project oriented and require an extensive understanding of policies, procedures, precedents, and laws governing the retirement system. They act very independently and with authority, with little or no review of finished projects.

A Member Service Representative IV typically –

1. analyzes various reports, conducts random audits, proposes solutions for organizational problems, and initiates actions to correct, revise, and/or improve organizational efficiency and effectiveness.
2. serves on a front-line problem solving team and works on special projects.
3. develops statistical productivity measures and standards.
4. acts as external liaison, serves as spokesperson for retirement system regarding policies, procedures, and law to professional organizations, reciprocal systems, and employers.
5. creates and delivers expert training to retirement system staff, members, and agencies.
6. serves as systems resource; provides expert knowledge in the planning, creation, and maintenance of computer systems and information.
7. creates, administers, and justifies administrative, personnel, and/or equipment budgets for their area.
8. performs other related duties as assigned.

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

**Level I: Member Service Representative I**

**4819**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination of the following, totaling three years (36 months), from the categories below:
  - a. credit for college training leading to a major or concentration in business administration, communications, public relations, or related fields
    - 60 semester hours equals 12 months
    - 90 semester hours equals 24 months
    - 120 semester hours or a Bachelor's Degree equals 36 months
  - b. work experience in customer service or office administrative support

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Applied knowledge of computers
2. Good verbal and written communications skills
3. Ability to learn and apply the rules, policies, and practices of the retirement system and other state and federal governmental agencies
4. Ability to work with diverse member base

5. Ability to deal with the members, annuitants, and agencies in a friendly manner to achieve positive customer service
6. Team oriented

**Level II: Member Service Representative II****4820**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination of the following, totaling three years (36 months), from the categories below:
  - a. credit for college training leading to a major or concentration in business administration, communications, public relations, or related fields
    - 60 semester hours equals 12 months
    - 90 semester hours equals 24 months
    - 120 semester hours or a Bachelor's Degree equals 36 months
  - b. work experience in customer service or office administrative support
3. Eighteen (18) months of work experience comparable to that performed at the Member Service Representative I level of this series

## PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Applied knowledge of computers
2. Good verbal and written communications skills
3. Ability to learn and apply the rules, policies, and practices of the retirement system and other state and federal government agencies
4. Ability to work with diverse member base
5. Ability to deal with members, annuitants, and agencies in a friendly manner to achieve positive customer service
6. Ability to travel within the state to different work sites
7. Team oriented

**Level III: Member Service Representative III****4821**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Thirty-Six (36) months of work experience comparable to that performed at the Member Service Representative II level of this series

## PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Broad knowledge of the rules, policies, and practices commonly used by retirement systems and other state and federal government agencies
2. Working knowledge of computers and computer systems
3. Understanding of team dynamics and facilitation
4. Excellent verbal and written communications skills
5. Ability to work with diverse member base
6. Ability to exercise independent judgment
7. Ability to travel within the state to different work sites
8. Inclination towards problem solving

**Level IV: Member Service Representative IV****4842**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Sixty (60) months of work experience comparable to that performed at the Member Service Representative III level of this series

## PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Extensive knowledge of policies, procedures, and laws governing public retirement systems
2. Excellent communications skills
3. Skill in exercising independent judgment
4. Ability to coordinate and oversee projects
5. Ability to travel within the state