Member Services Representative Series

Code No.	Class Title	Occupational Area	Probationary Period	Effective Date
4819	Member Service Representative 1	02 Semi-Professional	12 mo.	XX/XX/XX
4820	Member Service Representative 2	02 Semi-Professional	12 mo.	XX/XX/XX
4821	Member Service Representative 3	02 Semi-Professional	12 mo.	XX/XX/XX
4842	Member Service Representative 4	01 Professional	12 mo.	XX/XX/XX

Promotional Line: 346

Series Narrative

Employees in this series provide customer service and assistance to individuals affiliated with a retirement system. They respond to inquiries and requests regarding retirement benefits, including electronic and paper records, and assist members in understanding requirements.

Classifications in this series require a high level of detail orientation, accuracy, and the ability to apply policies and legal requirements to a variety of complex situations.

Distinguishing Characteristics

At the Member Service Representative 1 level, employees are considered entry-level, with limited or no prior experience in the public-sector retirement system field. After completing extensive training, employees work on developmental assignments that are initially routine in nature, requiring limited judgment and decision-making.

As a Member Service Representative 2, employees are fully competent and productive contributors who apply acquired job skills, policies, and procedures to complete assignments and projects of moderate scope and complexity.

A Member Service Representative 3 is able to address matters that are difficult and often complex by applying an in-depth understanding of the field. They are able to analyze problems and issues of diverse scope and determine solutions.

A Member Services Representative 4 is a technical leader with a high degree of knowledge in the overall field and recognized expertise in specific areas. Problem-solving frequently requires analysis of unique issues or problems without precedent or structure.

This series is distinguished from other classifications by serving a statewide public-sector retirement system.

DESCRIPTIONS OF LEVELS OF WORK

Level 1: Member Service Representative 1 4819

Employees at this level are entry-level representatives with limited or no prior experience in a related field. They participate in extensive on-the-job training to learn the retirement system's policies, procedures, and systems. Through this training, they develop the skills needed to respond to basic inquiries, handle routine customer service requests, maintain accurate records, and support higher-level personnel. Employees work under close supervision, with a supervisor providing frequent and detailed review of work. Instruction, advice, and assistance are readily available.

Illustrative examples of work:

1. Participates in extensive training to develop knowledge and skills related to policies, procedures, regulations, and systems associated with the retirement system and other state and federal government agencies.

2. Assists with a high volume of member calls and email inquiries regarding a variety of retirement questions and issues related to their accounts or benefits.

3. Provides information to members in a small group or on an individual basis, both virtually and in person, to assist them with retirement-related decisions. Refers non-routine questions to higher-level Member Service Representatives or other sources of assistance.

4. Performs routine calculations for basic claims and assists with resolving simple benefit issues.

5. Analyzes reports, computer terminal display data, records, and other data related to a member's account to determine eligibility and other information related to the member's account.

6. Enters, updates, and maintains member records in information management systems and retrieves records from databases or other files as needed. Applies a strong focus on precision and thoroughness to spot errors, maintain accuracy, and ensure quality work.

7. Supports higher-level staff in the completion of more difficult operations.

8. Performs other related duties as assigned.

MINIMUM ACCEPTABLE QUALIFICATIONS
Competencies to be verified by the placement officer

Level 1: Member Service Representative 1 4819

1. Education, Experience, or Training:
    A. A bachelor's degree (or 120 credit hours) in any discipline,

    - **OR** -

    B. An associate degree (or 60 credit hours) and 18 months of work experience that has provided skills in communication, customer service, education, finance, human resources, office support, training, or a field that provides skills in the Knowledge, Skills, and Abilities listed below.

    - **OR** -

    C. Three years of work experience that has provided skills in communication, customer service, education, finance, human resources, office support, training, or a field that provides skills in the Knowledge, Skills, and Abilities listed below.

Licensure or Certification Requirements
None

Knowledge, Skills, and Abilities
These are listed in alphabetical order:

1. **Analysis:** You can collect, analyze, and evaluate information to solve problems and make decisions. You are able to break complex problems into smaller pieces, identify patterns and relationships, and interpret data to draw conclusions.

2. **Compliance:** You are able to learn and apply relevant laws, regulations, and policies to assigned work.

3. **Confidentiality Practices:** You are able to follow policies and practices to protect sensitive information from unauthorized access, use, or disclosure.

4. **Customer Service**: You can communicate with others to understand their needs and provide timely and accurate responses to answer questions and resolve concerns.

5. **Data Entry:** You can enter and update data accurately and efficiently into a computer system or database.

6. **Detail Orientation:** You can identify errors, maintain accuracy, and ensure quality in your work.

7. **General Math:** You know how to perform basic math functions, including addition, subtraction, multiplication, and division, using whole numbers, fractions, and decimals, using calculators, spreadsheets, or custom applications.

8. **Interviewing Skills:** You know how to use techniques and practices to prepare relevant questions, build rapport, evaluate responses, and to provide guidance and information using active listening, critical thinking, and effective communication to guide the conversation and achieve objectives.

9. **Office Technology:** You can use a variety of office equipment and software to maintain records, access information, and prepare documents.

10. **Teamwork**: You can support others towards a shared work goal by listening actively, communicating clearly, and contributing to team tasks and information needs.

11. **Verbal Communication:** You can communicate effectively by speaking clearly, actively listening, and explaining terms and concepts in a way that others can understand.

12. **Written Communication:** You can communicate effectively in writing using clear language and proper grammar, punctuation, spelling, and formatting.