

Job Description

TEMP to PERM

Position Title: MSC Representative Trainee

Unit/Department: MSC/Operations

Classification: Exempt Non-Exempt

Eligible for Commission: Yes No

Reports to: MSC Supervisor

Eligible for Telecommuting Consideration: Yes No

Summary/Objective

This is the entry-level, trainee position in the customer service progression, which requires direct supervision. The individual processes basic administrative policyholder requests (e.g., beneficiary changes, address changes, requests for forms, etc.). Maintains customer files, answers incoming policyholder calls and responds to basic problems and inquiries. More complex or technical questions/problems (e.g., policy provisions, conversions, exchanges, etc.) are referred to senior-level customer service representatives. Incumbent processes policy values (e.g., calculating amount of cash values, premium refund due, loan balance or loan interest refund), death benefit requests and policy changes. Requires intermediate clerical skills including: keyboarding (45 wpm), 10 key (4500 ksph), filing, copying, scanning, faxing, proofreading, researching, etc., and intermediate knowledge of various software programs to include: Microsoft Word, Excel, PowerPoint and Outlook. This position requires a professional demeanor, attention to detail and the ability to juggle many tasks at once. Position requires basic knowledge of company products, the ability to interpret policy provisions, and knowledge of administrative practices relating to company procedures. Maintains workflow and quality control in accordance with established procedures and guidelines. This position is expected to develop and transition to Level 1 within the first year of hire.

Essential Functions.

- Answer agent and member questions regarding policy information.
- Document all inquiries in administrative system.
- Generate letters.
- Proofread all correspondence and system notes for grammar, spelling, punctuation, accuracy of information, etc.
- Navigate multiple administrative systems simultaneously.
- Research files.
- Complete process requests and direct to other departments.
- Set up files and correspondence to be imaged.
- Communicate effectively in oral and written form paying attention to detail.
- Various clerical duties as directed.
- May assist other units in the Operation Department as needed

Competencies

- Accountability
- Coachable
- Communication(Oral & Written)
- Computer Skills-Basic
- Customer Oriented/Service
- Job Knowledge
- Quality Output
- Team Mindset

Supervisory Responsibility

This position has no direct supervisory responsibilities.

Work Environment

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, and fax machines.

Physical Demands

This is a largely sedentary role, must be able to remain in a stationary position at least 50% of the time. Filing,

printing, faxing, scanning and copying is required; this requires the ability to move about the office and position self to access equipment and file cabinets, transport items (files, box of paper, etc.) weighing up to 20 lbs., and ascend/descend step ladder/stool as necessary. The position requires extended hours in front of a computer screen and operation of a computer and other office equipment such as a calculator, and copy machine. This position requires the ability to communicate and exchange accurate information via telephone and in person.

Hours of Work

This is a full-time position. Regular office hours are Monday through Thursday, 8:00 a.m. to 5:00 p.m., Friday 8:00 a.m. to 3:00 p.m. Occasional evening and weekend work may be required as job duties demand. This position requires face to face and in-person interaction and requires the incumbent to be in the office during regular office hours to access information kept on-site.

Travel

No travel is required for this position.

Required Education and Experience

- High School Diploma
- Minimum one year related experience
- LOMA Level 1 Certification (281 & 291), required as part of initial training plan

Preferred Education and Experience

- Some College or Insurance Certification or License
- Bilingual (English/Spanish)
- Minimum one year of customer service or sales experience within the insurance/financial industry

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice. Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Signatures

This job description has been approved by all levels of management:

Supervisor/AVP/VP _____ Date _____

HR _____ Date _____

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____