

POSITION DESCRIPTION

Job Title: Client Services Support Clerk
Status: Non-exempt
Department: Client Services

PURPOSE:

To provide support for the Client Services Specialist Team by performing clerical and administrative duties assisting the Client Services Specialist Team. This position will be responsible for prepping premium, scanning checks for deposit, prepping and scanning AI documents, working AI conversion reports, data entry of Short Tem Medical applications, assisting in the rejected credit card process, filing daily reports, faxing documents for the Client Service Specialists, in addition to other supportive functions for the team/department.

ESSENTIAL FUNCTIONS: 80%

1. An important component of this position is to provide services mentioned above in a professional and courteous manner enabling Allied to be recognized as a service-driven organization, internally as well as externally.
2. Prep premium received according to department guidelines and standards. Scan checks for deposit using the Enterprise Bank software, prepare bank deposit and complete the daily premium deposit worksheet.
3. Retrieve and work daily eligibility reports from the AI system. Be proficient in investigating feed issues and making necessary changes to maintain correct data in the AI system on a current basis.
4. Assist Specialist with rejected credit notification process by processing the Client/Agent email process, until this function is automated. After process is automated additional support needs will be evaluated.
5. Prep and process daily Pivot eligibility feed following established guidelines maintaining same day turn around objectives.
6. Assist Specialist in preparation of monthly Claim Fund Refunds by printing letters, filling out UPS mailing labels, and stuffing the envelopes.
7. Prepare and scan Client Service documents into the AI system following established document type guidelines.
8. Assist in processing of termination and billing issue reports following established guidelines.
9. Assist Specialists in Agent appointment process by pulling document information and filing finalized paperwork in AI.
10. Work the monthly Billing Report, order bills as needed on a monthly basis.

11. Process address and name changes received through Contact Management or incoming mail.

12. Conduct outgoing calls to acquire missing information such as email addresses and/or phone numbers from enrollment applications.

MARGINAL FUNCTIONS: 20%

1. Collect and fax all outgoing faxes for Client Service Specialists and Client Service Representatives.
2. Assist other departments with production during idle times.
3. Assist with processing miscellaneous work/special projects that as presented from the department.
4. Identify and report process improvements to help maintain proficient, timely and accurate processing of Allied business.
5. Serve as a back up on the mail/cert desk by working in a rotation to assemble and mail Member ID Kits and sorting/delivering mail.

REQUIREMENTS:

1. One to two years related work experience or equivalent education.
2. High school graduate or equivalent.
3. Ability to operate a computer and 10-key calculator.
4. Ability to perform basic mathematical functions.
5. Ability to compose proper business correspondence (i.e., letters, emails, and file documentation).
6. Ability to speak, read, comprehend and follow written or verbal English instructions.
7. Ability to meet all company attendance requirements.
8. Ability to meet departmental training, quality and production standards.

FACTORS IMPORTANT TO SUCCESSFUL PERFORMANCE OF POSITION:

Problem solving	Interpersonal skills
Analytical ability	Flexibility
Communication skills	Team Player

Must be capable of reviewing and analyzing various correspondence, billings, case/payment histories or internal forms and determine correct handling of problems related to insured's billings and

payments. Must be capable of communicating, both verbal and written, to insureds and agents of payment requirements or explanations.

PHYSICAL DEMANDS OF POSITION:

Standing/Sitting	95% of time	All duties
Walking	5% of time	Walk to office equipment
Lifting/Carrying 10 lbs.	<1% of time	Handling files.
Reaching/Handling	60% of time	Reach for files on desk, use telephone, printer/copier/scanner, and handle reference materials
Handling	40% of time	Bills, correspondence, checks, supplies
Speaking/Hearing	100% of time	As necessary to gather and provide information and data
Seeing	100% of time	Review data from the computer system, faxes, reference materials, etc.

NOTE: Applicants who need accommodation for an interview or job testing, please request this in advance from the Human Resources Department.