

POSITION DESCRIPTION

Job Title: Client Services Representative
Status: Non-exempt
Department: Underwriting and Client Services (UCS)

PURPOSE:

To apply the knowledge of Allied's products, the Certificates of Insurance, the computer system and company procedures and philosophies along with judgment, in providing service to agents, insureds, providers and other outside sources on both a pro-active and responsive basis. The CSR will work in a team atmosphere utilizing not only their own expertise, but also the expertise of their peer group and staff in other departments to solve problems, provide information, and lend assistance involving multiple functions of the company. The focus of this position is to provide the services mentioned above in a professional and courteous manner, enabling Allied to be recognized as a service-driven organization.

There are two Client Services Representative levels. For Level 2, one must be proficient in Level 1.

LEVEL 1 - CSR

ESSENTIAL FUNCTIONS: 75%

1. Attain and keep current an in-depth knowledge of all procedures and guidelines of the Client Services department. Remain up to date in the scope and depth of knowledge required to effectively apply all procedures and guidelines involved in Claims and UCS in order to answer related questions from our customers.
2. Be proficient in the use of telephone equipment, i.e. placing calls on hold, transferring calls, retrieving messages from voice mail, conference calls, etc.
3. Be proficient with all computer applications used in handling customer contacts, i.e., DG, Contact Management, AI, Win-Allied, Oracle Claimant documentation system, Symposium, WCP email system, Magellan Rx, and the department copier/printer/scanner.
4. At all times, represent Allied in a positive, professional, thorough, and helpful way.
5. Document all calls, inbound/outbound, in Allied's contact management system.
6. Meet established department production standards for quality and quantity.
7. Handle inbound and outbound contacts (calls, e-mails, and faxes) and determine the proper routing or course of action for those contacts. Ask all questions necessary concerning the issue, thus resulting in complete resolution and eliminating additional calls. If necessary, take responsibility for this contact and follow through to conclusion.

MARGINAL FUNCTIONS: 25%

1. Interpret and recommend updates to procedures & documents.
2. Assist other departments with production during idle times.
3. Assist with processing miscellaneous work that is presented to Client Services.
4. Assist with making pro-active calls to our employers' groups as assigned.

LEVEL 2 – SR CSR

ESSENTIAL FUNCTIONS:

1. Must be proficient in all functions in level 1 in accordance with department quality and quantity production standards.
2. Ability to manage escalated calls.
3. Process Magellan RX eligibility issues on Magellan Rx system.
4. Ability to do extensive research on a Claim's or UCS situation to determine the issue and provide a solution.
5. Write synopsis history for further review by management, on lawsuits or Insurance Department Complaints for groups or individuals.
6. Successfully complete a recognized course in Medical Terminology and pass a proficiency exam.

(Management retains the discretion to add to or change the functions of this position at any time.)

REQUIREMENTS:

1. Associate of Art degree or minimum 2 years of college course work strongly preferred.
2. Minimum of 2 years of Customer Service experience in a Call Center is preferred.
3. Minimum of 2 years of life & health insurance experience preferred.
4. Ability to communicate in an assertive but positive manner, using excellent telephone communication skills (i.e. listening for understanding, responding accurately and professionally, and expressing self clearly and courteously.)
5. Knowledge and understanding of medical terminology strongly preferred.
6. Ability to speak English fluently, read, comprehend, follow and give written and verbal English instructions.

7. Ability to make decisions independently.
8. Ability to perform basic math skills.
9. Intermediate level proficiency with Windows – based systems, including but not limited to Microsoft Word.
10. Ability to compose proper business correspondence (i.e., letters, memos and file documentation) and communicate clearly in e-mail responses to internal and external customers.
11. Ability to meet company attendance requirements and work overtime as necessary.
12. Ability to sit or stand for 7.5 hours per day.
13. Ability to meet departmental training standards.
14. Ability to achieve and maintain department quality and quantity production standards.
15. Ability to work under and handle stress associated with varying work loads and deadlines, dealing with difficult callers and handling a high volume of inbound and outbound contacts.

FACTORS IMPORTANT TO SUCCESSFUL PERFORMANCE OF POSITION:

Problem solving	Interpersonal skills
Analytical ability	Flexibility
Communication skills	

The position requires the ability to assess a problem and analyze the facts to reach appropriate conclusions and convey that information accurately to others. Communication and interpersonal skills are necessary as the position requires extensive telephone contact and written correspondence.

PHYSICAL DEMANDS OF POSITION:

Standing /Sitting	98% of time	Must remain at work station.
Walking	2% of time	Walk to reference and supply area.
Lifting/Carrying 10 lbs.	<1% of time	Handling files.
Stooping/Kneeling Reaching/Handling	100% of time	Reach for files on desk, use telephone, printer/copier/scanner, and handle reference materials.
Speaking	90% of time	Conversations to secure and provide information.

Hearing	90% of time	Conversation to secure and provide information.
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.