

Job Title:	Customer Service Representative	FLSA:	Non-Exempt
Division:	Insurance	Revision Date:	12/01/2020

Position Purpose:

The Customer Service Representative (CSR) is an entry level position that provides customer service, administrative and processing duties for elective benefits. This position interacts with customers and provides information in response to inquiries about products and services. The CSR resolves issues in a timely and accurate manner and provides constant support in order to enhance the brand image of Midwest Heritage Insurance Services.

Essential Functions:

Customer Service:

- Provides service to customers by either in person, electronic, or telephone contact and responds to customer inquiries promptly.
- Provides support to sales agents as requested.
- Reports to work when scheduled and on time.

Administration:

- Provides clerical support including data entry, scanning, copying, and mailing.
- Keeps detailed record of customer interactions and comments as well as the action taken.
- Prepares labels and letters weekly for multiple mailing projects.
- Assembles new hire elective benefits packets; mails to employees as requested.

Elective Benefits Processing:

- Data entry of applications in order to initiate payroll.
- Assists with payroll changes and cancellations.
- Assists employees who are on a leave of absence with their premium payments.
- Assists with insurance carrier payments.
- Assists customers with filing claims under their elective benefits.

Secondary Duties and Responsibilities:

Performs other job-related duties and special projects as required.

Knowledge, Skills, Abilities Required:

- Must have a friendly, positive attitude, willingness to learn and strong communication skills.
- Must show leadership and excellent customer service.
- Strong attention to detail and ability to meet deadlines.
- Must have proficiency of PC with Microsoft Word, Excel, and Outlook.
- Excellent organizational and follow-up skills.
- Excellent data entry skills.
- Demonstrated experience maintaining and tracking data on reports and spreadsheets.

- Must maintain a high degree of confidentiality.

Education, Experience, and Other Requirements:

- High school diploma or equivalent.
- At least one year of similar or related work experience preferred.
- Must have life, accident, and health insurance licenses or willingness to obtain insurance licenses within 45 days or 3 exam attempts.

Reporting Relations:

Accountable and Reports to: Agency Administration Supervisor

Supervisor Responsibilities: None

Working Conditions and Physical Requirements:

- The duties of this position are normally performed in a general office setting. This is a fast paced work environment.
- This position is classified sedentary/light and requires the ability to sit for long periods of time.
- There is frequent pressure to meet deadlines and handle multiple projects in a day.
- Visual requirements include: ability to see detail at near range with or without correction.
- Must be able to perform the following physical activities: sitting for long periods, talking (in person and by telephone), hearing and repetitive motions.

Equipment Used:

Computer (PC with Microsoft Office programs), telephone and headset, webcam, calculator, copier, fax, printer, letter folder and agency management software and tools.

Other Position Requirements:

Contacts: This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

Confidentiality: This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.
- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations.
Please return a signed original to Human Resources for the employee file.

Employee Name (please print)

Date

Signature of Employee

Date