

## **Preferred Health Care Job Description**

**Job Title:** Lead Customer Service Representative  
**Department:** Customer Service  
**Reports To:** Vice President of Operations

### **SUMMARY**

To provide superior service and support to all customers through the acquisition of proficient knowledge of all departments in order to provide fast and courteous service to our providers, employer groups and clients. The end result of which will be the elimination of the misdirection of customers, a superior customer experience and above average customer satisfaction.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following.

- Answers all initial telephone calls and provides requested information (including, but not limited to):
  - Claim status and discount questions
  - Provider participation requests for inclusion in the network
  - Assist clients, subscribers, and providers with inquiries and problem solving
- Ensures superior client service experience by personally assisting and ensuring all client needs are addressed and answered completely upon inquiry. Impact the company's bottom line by turning frustrated clients into repeat customers.
- Serves as primary escalation contact for account managers and responsible for collaborating with them to resolve and implement any service recovery measures to address customer disruptions.
- Will meet or exceed all quality assurance measures as outlined by the Supervisor or company.
- Log all calls and complaints into Access Complaint/CSR Log database.
- Handle insurance verification calls from providers while focusing on first call resolution.
- Requires the ability to interact with difficult clients, members, and/or providers.
- Repricing of claims and all related processes
- Processing and adjudication of claims.
- Provide appropriate solutions and alternatives in a prompt manner and follow up as necessary to confirm service resolution.
- Import EDI claims and resolve errors in EDI batches.
- Prepare, print and mail monthly access fee invoices.
- Manage "Waiting for Faxes" report and perform follow up as needed with providers.
- Email appropriate Manager about department complaints. Ensure timely complaint resolution for all service inquiries received.
- Studies and recommends standardized procedures to improve efficiency of their department to Supervisor.
- Responsible for staying updated on product knowledge as well as changes in company policy.
- Manage incoming faxes and distribute to appropriate personnel.
- Meet personal and team goals for productivity.
- Collates and distributes daily Benefit Statements to payors.
- Maintains comprehensive working knowledge of all company departments, their functions, and the way they inter-relate to each other.
- Act as backup support for Administrative Support Specialist and provide coverage for front desk as needed.
- Other duties as assigned.

**QUALIFICATIONS**

To perform this job successfully, Customer Service Representatives must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Must possess the willingness to learn multiple department functions to adequately answer incoming calls and provide accurate answers.

Requires the ability to interact with difficult clients, members, and/or providers in a courteous, professional manner.

**EDUCATION and/or EXPERIENCE**

Associate’s degree (A.A.) or equivalent from a two-year college or technical school; or six months to one-year related Customer Service experience; or equivalent combination of education and experience.

Must be proficient in Microsoft platform applications (Word, Excel, and Access database).

Experience in processing claims is helpful, but not required.

**LANGUAGE SKILLS**

The position will require the ability to read and interpret instructions and procedure manuals; ability to interpret routine reports and correspondences and the ability to speak effectively and professionally to clients, providers, and employer groups. Strong customer service orientation with active listening skills and a high attention to detail with professional verbal and written skills. Ability to explain policy provisions and other insurance related matters to lay customers in a clear and concise fashion

**MATHEMATICAL SKILLS**

Ability to calculate figures and amounts such as discounts, interest, and percentages.

**REASONING ABILITY**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, or scheduled form. Ability to apply a comprehensive knowledge of PHC and its products and services as necessary to provide superior service to all customers.

**PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit. Specific vision abilities required by this job include close vision, and ability to adjust focus during computer operation.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Activities performed at a fast pace in an oriented office environment.

At times employee may need to interact with difficult clients, members, and/or providers.