

Job Description

Job Title: Account Representative
Reports To: Manager – Employer Services
Department: Employer Services
Division: Benefits

Pay Range: 3
FLSA Status: Non-Exempt

SUMMARY: This position builds rapport with employer accounts. Resolves employer issues/problems, researches and makes recommendations for correcting employer issues including membership, earnable salary, billing discrepancies, delinquencies and reporting errors.

ESSENTIAL FUNCTIONS:

1. Maintains relationships and favorable contact via telephone, email, and written correspondence with employers in accordance with Ohio Revised Code 145, OPERS Board rules and administrative policies ensuring accurate, complete and timely service.
2. Applies employer payments and credits of approximately \$3.2 billion to reports of retirement contributions, service purchase by payroll deduction reports, employer liabilities, and ERI payments into the ROCKS, ERI, or accounts receivable systems by executing employer instructions received via a payment remittance advice, through research into an employer’s case file, or by calculating/determining the best use of funds to minimize employer penalties and interest.
3. Performs research and in-depth analysis of employer financial account activity to include assisting with balancing of subsidiary ledger to the general ledger, delinquency issues and collection of outstanding account balances, certifications, service purchase by payroll deduction, Early Retirement Incentive billings, exception refunds, etc., to ensure accuracy of OPERS Annual Statements, actuary projections, and compliance with GASB 67 and 68.
4. Processes employer reports of retirement contributions, service purchase, non-contributing reports, Alternative Retirement Plan reports and manually calculates and applies accrued interest and payments to employer payment plans.
5. Identifies needs and trends in respective assigned employer account groups and recommends potential remedies to the associated compliance team members and management.
6. Markets employer accounts to higher levels of self-service, such as ECS reporting, payment and forms submission by initiating contact with CRM employer groups.
7. Performs other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES TO PERFORM ESSENTIAL FUNCTIONS

Education

• High school diploma or GED	• <input checked="" type="checkbox"/> Required
• Associates Degree in related field	• <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred

Direct relevant experience can be substituted for education (if applicable)

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Qualifications

• Aptitude for understanding financial information	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Heightened skill set of research and analysis	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Strong initiative and require minimal management direction	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Clear and concise communication skills	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred

Job Description

<ul style="list-style-type: none">• Creative and able to think outside the box	<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
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Experience

<ul style="list-style-type: none">• 2 years' experience in providing strong customer service to external or internal customers	<ul style="list-style-type: none">• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
<ul style="list-style-type: none">• Experience in a call center environment	<ul style="list-style-type: none">• <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred

*Physical Requirements** (if applicable)

<ul style="list-style-type: none">• Select Physical Requirement
<ul style="list-style-type: none">• Other:

***Reasonable accommodations may be made to enable individuals with disability to perform the essential functions. If repetitive physical movement is required to perform the essential functions of the position, please discuss with HR**

DISCLAIMER: *The above statements are not intended to be construed as an exhaustive list of all duties, skills and responsibilities required.*

