JOB DESCRIPTION

Job Title: Customer Care Administrator
Department: Customer Care
Reports To: Internal Compliance & Operations Supervisor
FLSA Status: Non-Exempt
Date: February 27, 2026

SUMMARY

The Customer Care Administrator handles inquiries from members and may specialize in certain types of transactions such as COB/COA documentation and processing, RMDs, policy surrenders and POA reviews. Inquiries may be received by telephone or through written correspondence. Requires in-depth knowledge of products to evaluate facts, policy provisions and caller information. Following the procedures approved, the Customer Care Administrator will prepare and send letters, change beneficiaries and input information into the Policy Administration system.

The Customer Care Administrator also performs various email and mailroom duties, as required.

The Customer Care Administrator may also assist the sales team and the New Business department with various administrative and research tasks.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following:
(Other duties may be assigned.)

- Handle customer service inquiries and problems via phone and appropriately field email inquiries. Research, respond, and discuss various aspects of the policy with members.
- Utilize Salesforce to track phone calls, emails and correspondence with all members.
- Provide proper guidance to members regarding changing beneficiaries, premium payments and change of ownership.
- Efficiently access multiple systems (Salesforce, FIMMAS, etc.) to provide clear, complete and accurate response to customer inquiries.
- Prepare written correspondence to members and internal team.
- Print Billing and Annual Statements daily and reconciling the daily reports of each in Fimmas.
- Review Premium Notices and reconciling the daily reports of each.
- Process name, address and beneficiary changes by performing a timely review of the documents for accuracy, logging the forms in Salesforce and maintaining the member file.
- Process Systematic withdrawals, RMD's and Surrenders daily and maintain surrender/retention log.
- Research Lexis/Nexis for Cannot Locates/Bad Addresses/Disconnected Numbers.
- Associates are expected to perform responsibilities in a consistent, professional manner while exercising strong verbal, interpersonal and quality service skills.
- Work at all times to enhance and strengthen the relationship between the member and the Society.
- Maintain and report progress and goals in weekly one on ones with management.
- May provide basic information to callers, as appropriate.
- Maintain effective communication and working relationships with all employees.
- Complete mailroom services tasks as requested by manager.

- Any additional duties that are necessary to complete this job role.

Supervisory Responsibilities:
None

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

- Demonstrated Customer Service skills.
- Must have exceptional organization and time management skills.
- Knowledge of Office 365 and Salesforce
- English/Spanish Bi-Lingual helpful but not required.
- Demonstrated administrative skills including filing and data entry.

Education and/or Experience:

- High School Diploma or equivalent
- 3+ years of Customer Service Experience in a professional environment
- 1+ years of Insurance Industry experience is helpful but not required.

Communication Skills:
Ability to read and analyze certificates and policy documents. Ability to respond to common inquiries or complaints from members.

Mathematical Skills:
Ability to calculate simple math 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, diagram, or schedule form.

Computer Skills:
To perform this job successfully, an individual should have knowledge of Word Processing and Spreadsheet software such as Word and Excel.

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 accommodation 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; use hands to finger, handle, or feel; reach with hands and arms and talk or hear.
- Employees may occasionally be required to lift and/or move up to 15 lbs.
- Specific vision abilities required by this job include close vision and distance vision.

Work Environment

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

- While performing the duties of this job, the employee is in a typical office environment.
- The noise level in the work environment is usually moderate.

Employee Signature: _____ Date: _____