

Job Title: Client Support Specialist  
Reports To: Case Coordinator  
FLSA: Non-exempt

Qualifications: Extremely organized, ability to multi-task, work independently in a fast passed environment without little supervision and strong interest in insurance voluntary benefits. Strong knowledge of Excel and PeachTree Accounting a plus along with being fluent in Spanish.

Job Description:

1. Customer Service
  - a. Provide phone support for all policyholders.
  - b. Resolve any minor service issues.
  - c. Work with carrier to resolve issues.
2. GBS
  - a. Enter and Maintain client database
  - b. Enter and maintain enrollment production amounts
3. Enrollment Updates
  - a. Maintain and distribute listing of ongoing and future enrollments
  - b. Compare actual to predicated results for each enrollment
4. Policies
  - a. Mail out policies to clients
  - b. Contact Clients every month to request list of terminated policy holders.
  - c. Contact terminated employees to setup direct billing.
5. Paper Applications
  - a. Scan apps
  - b. Enter data into deduction list in excel
  - c. Send apps to carrier
  - d. Follow-up with any missing information reports if any
6. Enrollment supplies
  - a. Ordering and shipping enrollment supplies to site.
  - b. Ensuring we have supplies in house if necessary.
  - c. Follow-up call to ensure delivery and receipt of supplies at site.
  - d. Make any reservation as needed (i.e., airfare, hotel, car rental, etc.)
7. Department head folders
  - a. Ensuring the requested amount of Department head folders and prospect folders are prepared prior to meetings.
8. Client Census
  - a. Request census of employees from each client when needed
  - b. Type census information into excel if needed

9. Post Enrollment Duties

- a. Supply client with deduction listing when applicable.
- b. Supply client and /or policyholders with post enrollment packets.
- c. Call client to confirm receipt of deductions.
- d. Receive and record all enrollment expenses and enroller payouts into PeachTree
- e. Submit purchase orders to Dennis for approval and give to accounting

10. Sending Payroll Stuffers and Posters to clients

- a. Printing, copying, and shipping stuffers to clients
- b. Follow-up call to ensure delivery and stuffing of paychecks

11. Other Duties

- a. Any other duties not listed shall be assigned as needed.

To be considered for this position, send your resume to Deb Cleaveland at [dcleaveland@alliancews.com](mailto:dcleaveland@alliancews.com) with “Client Support Specialist” in the Subject line.