

## Boston Retirement Board - Member Services Contact

### Overview:

The Boston Retirement Board seeks to provide accurate, timely, and consistent guidance and benefits to its members. Reporting to the Operations Officer, and in accordance with performance indicators such as quality of service and productivity, the Member Contact Representative acts as the front desk receptionist and is often the first point of contact for members of the Boston Retirement Board. Duties include, but are not limited to, answering all calls to the general numbers, greeting members and other office visitors upon arrival, performing duties to maintain the customer relationship management (CRM) function in the V3 system, such as logging all contact events, and using the V3 system to perform some functions related to enrollment, verification, and document processing.

### Responsibilities:

- Acts as a receptionist; answers all incoming calls to the general numbers; takes messages or routes calls to appropriate staff; greets members (active employees and retirees), private financial institution money managers, vendors, and other office visitors.
- Answers queries relating to the value of an account, updating/changing beneficiaries, refunds, etc., received over the telephone or at the front desk following guidelines to address simple queries. Assists in the logging and distribution of forms regarding refunds, 91As, and annual affidavits. Receives forms from members; checks for completion and verifies identification as required.
- Speaks with members to obtain information on their requests, e.g., buyback plans; obtains client information from electronic files relating to the nature of the request, prior work by Member Service Representatives (MSRs), etc. Schedules clients' appointments and enters into Member Services Representatives' online schedules in a manner to ensure continuity of service of particular accounts or requests.
- Performs duties to maintain the customer relationship management (CRM) function in the V3 software, e.g., logs the name and purpose of callers and visits into the system; enters and/or updates data in the V3 application such as client appointments; enters pertinent information relating to client requests into CRM to assist Member Service Representatives (MSRs) in providing service to clients in the most effective manner; scans bar code of documents received from members to transfer data from forms to V3 software if necessary, and other CRM-related functions.
- Reviews information received from members through the Member Self-Service function, e.g., change of address, and sends email to member to confirm information received as required.
- Responds to written correspondence to the department (mail, fax, web queries, and email) as appropriate and forwards correspondence to appropriate staff such as MSR or Chief of Staff.
- Provides information to members as requested by departmental teams including Disability, Legal, Compliance, Reporting, etc.; e.g., sends emails to confirm transactions and schedules follow up appointments; sends appointment reminders when appropriate.
- Enters requests received from City agencies such as OMB, Auditing, Treasury, and the Law Department into V3 workflow function. Answers requests, i.e. number of new retirees, when information is readily available.
- Provides related office support functions, including document management, mail handling, filing, telephone coverage, and data entry upon request by senior management.
- Assists with special projects as assigned by senior management.
- Performs related work as required.

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### Minimum Entrance Qualifications:

- Four (4) years of full-time, or equivalent part-time, office experience.
- Knowledge of routine office practices and procedures and of filing and retrieval procedures (both hard copy and computer-based).
- Appropriate educational substitutions may be made. Knowledge of Massachusetts public employee retirement laws and regulations (MGL Ch32) is preferred.
- Ability to check and verify information; to record and enter data accurately into a computer system; to maintain records and files; to communicate effectively orally and in writing; to follow oral and written instructions; to act as a receptionist in an area with a large volume of calls and provide quality customer service in person and on the phone; to deal effectively with members and the general public; and to work effectively as a team member.
- Ability to exercise good judgment and focus on detail as required by the job.

### BOSTON RESIDENCY REQUIRED

#### Terms:

Union/Salary Plan/Grade:SEIU/RL-13 - Salary Min 45,385.13 Salary Max 63,108.97

Hours per week: 35

The City of Boston is proud to be an Equal Opportunity Employer. We are committed to creating a diverse and inclusive environment. Therefore, qualified applicants will be considered regardless of their sex, race, age, religion, color, national origin, ancestry, physical or mental disability, genetic information, marital status, sexual orientation, gender identity, gender expression, military and veteran status, or other protected category.

The City of Boston has played a role in causing and perpetuating the inequities in our society. To break down these barriers, we are embedding equity and inclusion into everything we do.

We define **equity** as **ensuring every community has the resources it needs** to thrive in Boston. This requires the active process of meeting individuals where they are. **Inclusion** is **engaging every resident** to build a more welcoming and supportive city. We are building a **city for everyone**, where diversity makes us a more empowered collective.

Please apply:

[https://city-boston.icims.com/jobs/28374/member-services-contact/job?hub=8&\\_gl=1\\*1sxbkfo\\*\\_ga\\*MTExNDU0ODM1MC4xNzI2NzU4MzY1\\*\\_ga\\_5Y2BYGL910\\*MTcyOTU0MTY5MS4zLjEuMTcyOTU0MjE2Mi41OC4wLjA](https://city-boston.icims.com/jobs/28374/member-services-contact/job?hub=8&_gl=1*1sxbkfo*_ga*MTExNDU0ODM1MC4xNzI2NzU4MzY1*_ga_5Y2BYGL910*MTcyOTU0MTY5MS4zLjEuMTcyOTU0MjE2Mi41OC4wLjA)