

New York State Department of Civil Service
DIVISION OF CLASSIFICATION & COMPENSATION

Classification Standard

Occ. Code 2515100

Customer Service Representative 1, Grade 9	2515100
Customer Service Representative 2, Grade 14	2515200
Customer Service Representative 3, Grade 17	2515300
Customer Service Representative 4, Grade 20	2515400

Brief Description of Class Series

Customer Service Representatives respond to inquiries regarding the New York State Insurance Fund's services and programs. These positions respond to complaints and gather and disseminate information to customers, such as claimants, policyholders, medical care providers, and the public.

These positions are classified only at the New York State Insurance Fund.

Distinguishing Characteristics

Customer Service Representative 1: non-competitive; responds to inquiries and complaints made by claimants, policyholders, medical care providers, attorneys, brokers, and the public.

Customer Service Representative 2: non-competitive; first supervisory level; trains and assists Customer Service Representatives 1; handles the more sensitive inquiries and cases.

Customer Service Representative 3: non-competitive; second supervisory level; supervises lower-level Customer Service Representatives; assists with monitoring and tracking program activities.

Customer Service Representative 4: non-competitive; section head over units of lower-level Customer Service Representatives; plans, coordinates, and oversees section operations.

Illustrative Duties

Customer Service Representative 1: reporting to a Customer Service Representative 2, responds to oral and written inquiries and complaints, and advises

customers of available options for resolving problems; gathers and reviews pertinent information and attempts to resolve problems; provides detailed information about agency programs and services; explains workers' compensation and disability benefits claims processing requirements; initiates customer contact to collect data on newly reported incidents regarding claims; performs database and record searches to expedite the review and processing of claims; refers difficult cases to supervisor or other appropriate staff for processing as needed; identifies and reports any trends and issues caused by problems in procedures or processes; may be assigned to special projects and to test new service concepts and procedures before complete adaptation; and may be assigned to a specialized unit to develop expertise in a specific function.

Customer Service Representative 2: reporting to a Customer Service Representative 3, monitors staff calls and oversees customer contacts to ensure adherence to quality control and performance standards and procedures; provides training to staff; directly handles high impact cases; assists in the maintenance and revision of policies, procedures, and training documents; develops action plans to improve performance; assists in interviewing and selecting new staff; works with training staff to develop and deliver training and educational materials; identifies problems or complaint trends and prepares reports identifying the impact on customer service; conducts performance evaluations; and acts as section supervisor as needed.

Customer Service Representative 3: reporting to a Customer Service Representative 4, supervises staff to ensure adherence to quality control, performance, and operations standards; develops and maintains staff schedules and monitors time and attendance; reviews and comments on proposals for training and educational curriculum; coordinates with staff to plan and review procedures and activities; reviews incoming correspondence and distributes assignments; monitors work volume to maintain service levels; identifies problem areas and provides techniques for improvement; assists in establishing work and quality control standards and productivity goals; collects and analyzes statistical data and prepares management reports; investigates complex cases and makes referrals for matters beyond their jurisdictional control; interprets and explains procedural requirements regarding workers' compensation and disability benefits claims processing; and implements strategies to improve customer satisfaction.

Customer Service Representative 4: under the supervision of higher-level supervisors and/or managers, develops and reviews workforce and workload plans, policies, and procedures; develops and implements strategies and changes for improving customer service and satisfaction; communicates with staff to plan and review procedures and activities; establishes service level objectives; prepares and maintains comparative analyses of workload and staffing patterns, service levels, and section goals and accomplishments; oversees the collection and analysis of data for management reports; monitors daily work volumes to ensure achievement of productivity and service levels; serves as liaison to program management; prepares memoranda on new and revised agency policies and procedures; supervises and monitors staff performance and prepares performance evaluations; reviews and

evaluates telecommunication needs as they relate to customer service operations; and serves on various inter-division committees to identify and report on issues.

Minimum Qualifications

Customer Service Representative 1

Non-Competitive: two years of customer service experience; or sixty college credit hours and one year of customer service experience.

Customer Service Representative 2

Non-Competitive: four years of customer service experience; or an associate's degree and two years of customer service experience; or a bachelor's degree.

Customer Service Representative 3

Non-Competitive: five years of customer service experience, one year of which must have been in a supervisory capacity; or an associate's degree and three years of customer service experience, one year of which must have been in a supervisory capacity; or a bachelor's degree and one year of customer service experience, one year of which was in a supervisory capacity.

Customer Service Representative 4

Non-competitive: seven years of customer service experience, one year of which must have been in a supervisory capacity; or an associate's degree and five years of customer service experience, one year of which must have been in a supervisory capacity; or a bachelor's degree and three years of customer service experience, one year of which must have been in a supervisory capacity.

Note: Classification Standards illustrate the nature, extent, and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all the work that might be appropriately performed by a class. The minimum qualifications above are those required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum requirements for appointment or examination.

Date: 10/2022

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