

## Participant Services Representative, MidAmerica

*Thank you for your interest in this opportunity at MidAmerica. Please review this position description and let us know if you are interested in applying for the position.*

### Position Overview

Reporting to the Participant Services Department Team Leader of this growing financial services company, the Participant Services Representative is primarily responsible for answering client queries in an accurate and time sensitive manner and in doing so, deliver world class service to internal and external clients of MidAmerica. The ability to work in a fast-paced and deadline driven environment is essential.

The incumbent must have the knowledge and skills to successfully handle a number of varied account queries. This position provides all front-line customer support needed to address client needs regarding plans and benefits and the knowledge and ability to escalate cases to an appropriate department or member of staff as necessary.

The successful candidate will provide the necessary information to the participants to satisfy their query and streamline their experience.

### The Opportunity

For a motivated Participant Services Representative with relevant experience, this opportunity offers several attractive features including the opportunity to:

1. Work with a *committed, knowledgeable, and experienced* team of passionate employees
2. Do this in *highly attractive Lakeland, Florida*, in the company's operations office
3. Use *varied skills to support* the Participant Services team and develop a long term career progressing through increasingly responsible roles
4. Earn a *competitive compensation* package and benefits

### MidAmerica

MidAmerica is one of the nation's leading providers and administrators of retirement and other tax-advantaged benefit plans for government and education employers throughout the US. The company provides innovative employee benefit programs for over a million educators and other public sector employees and 2,200 plan sponsors across the country, and has assets under management exceeding \$1 billion. Originally formed in 1995, MidAmerica's core business has been providing Social Security Alternative and Special Pay programs (tax-advantaged vacation and sick pay plans for governmental employers). This core business has grown dramatically and has expanded to include other defined contribution plans, Health Reimbursement Arrangements (HRA's), FSA administration, Trust (for public employer-sponsored healthcare plans that keep healthcare liability off the books), independent Third Party Administration Services (TPA), 403(b) and 457(b) administration and common remitting services,

and most recently, ACA Compliance Reviews. To date the company sells and distributes its products and services through a distribution network of insurance brokers that primarily sell into the public sector.

## The Ideal Candidate

The ideal candidate should have clear verbal and written communication skills, be highly organized and able to prioritize tasks. Most importantly, we seek an individual with patience and a positive attitude to effectively manage our customer's expectations. Equally important, this individual will be agile with a strong sense of collaboration and team work with the ability to anticipate, understand, and respond to the needs of internal and external clients to meet or exceed their expectations.

## Primary Responsibilities

MidAmerica's Participant Services Representative serves as a first point of contact for participant queries, handling a variety of concerns and questions from both internal & external employees and partners, such as plan enquiries, medical billing, FSA questions, dependent care eligibility, and other general benefit queries. The primary duties and responsibilities of the Participant Services Representative include but are not limited to the following:

### **Responsibilities:**

- Provide timely and accurate information to incoming customer queries in accordance with plan guidelines
- Through strong listening skills identify and assess the customer's needs to achieve satisfaction
- Possess the ability to analyze information and document it appropriately
- Able to follow guidelines and be highly detail-oriented
- Have a strong understanding of our product offerings in order to answer or escalate internal questions
- Continuously evaluate and identify opportunities to drive process improvements that positively impact the business
- Deliver exceptional on-demand client support for clients and partners which results in fanatical support of MidAmerica
- Ability to provide professional and articulate written and verbal communication
- Must routinely meet daily, weekly, and monthly deadlines
- Maintain a pleasant, patient, and friendly attitude

## Performance Measures

Performance will be measured by a number of quantitative and qualitative criteria. The primary outcomes and measurement of success for the Participant Services Representative include but are not limited to the following:

- After completing initial training & onboarding develop a professional personal brand for communications with internal staff as well as external partners
- Deliver exceptional on-demand client support by providing participants answers in accordance with plan documents
- Provide information and assistance to other departments to ensure accurate plan processing
- Be sensitive to the timely response required by clients, both internal and external and respond to all queries within 24 hours
- Ability to use technical tools to drive efficiency and accuracy
- Meet all other activity and outcomes goals

The incumbent will support the company's vision, mission, and values and help drive a PeopleFirst culture; doing what's best for the business, its employees, and its investors, protecting the company's reputation and being open, honest, and fair in all dealings and scenarios.

## Skills and Qualifications

Specific Qualifications and career profiles that are essential to the position are as follows:

1. Must have 1-3 years' direct customer service experience
2. Experience working in a fast-paced, high volume environment
3. Ability to work independently and collaboratively with team members
4. Consistently maintain a positive, approachable and friendly attitude
5. Regular attendance is required
6. Proven capabilities with working knowledge of computer skills including all Microsoft Office Applications

Specific competencies and attributes that are important to the position include:

1. Retirement industry experience preferred with exposure to retirement fund types (403b, 401k, 457 or 401a funds)
2. Working knowledge of IRS retirement regulations and ACA guidelines
3. Health Reimbursement/Flexible Spending Account experience (medical billing, EOB's, 213 eligible medical expenses, FSA debit cards, Dependent care eligibility)
4. Solid understanding of plan guidelines
5. Bilingual preferred

## Location

The position is based at the company's operations office currently located in Lakeland, Florida.

## About Our Work Environment

Our culture and environment encourage people who want to make significant contributions, work on challenging assignments, and prefer an open-minded approach to work. As a mid-stage company we seek people who are not afraid to take on varied assignments and to help out wherever needed. Someone looking for a structured corporate environment with weeks of training before starting the job would not be an ideal candidate. We have an exciting, open work environment that encourages team members to share ideas, try new things, and learn from past experiences. We look for team members who can collaborate with others, will challenge the status quo, understand the bigger picture, and make good decisions. We strive to help our employees achieve personal goals while contributing to the overall team effort. Reasonable accommodations will be made for applicants with qualified disabilities. All applicants must successfully pass a criminal background check and pass a drug test prior to commencing employment.

## COMPENSATION

Compensation is fair and competitive and the company offers a number of attractive benefits.

## CONTACT

Interested? Please submit cover letter and current resume to Human Resources at [careers@myMidAmerica.com](mailto:careers@myMidAmerica.com)