



COMMONWEALTH OF PENNSYLVANIA

TREASURY DEPARTMENT

Job Posting – Customer Service Representative

The Pennsylvania Treasury Department is looking for a dedicated individual who is interested in a rewarding career in government service, where you serve others and the greater public good every day. The Customer Service Representative will answer telephone calls placed to the Pennsylvania 529 College Savings Plan toll-free line, providing information to those inquiring about opening accounts, as well as to existing account owners.

TREASURY DEPARTMENT OVERVIEW

The Pennsylvania Treasury Department is an independently elected office of state government led by the State Treasurer who serves as the department's chief executive and as one of the largest state treasuries in the United States, it employs over 300 people and serves as custodian of more than \$150 Billion. As Pennsylvania's bank, Treasury plays a critical role in state government operations and acts as the custodian, investor, and disbursing officer of the funds of nearly all state agencies. Treasury also offers a wide range of programs and services to Pennsylvania families, such as helping to make college possible with the PA 529 College and Career Savings Programs; returning abandoned and unclaimed property to its rightful owner or heir; offering individuals a tax-free way to save for disability-related expenses with the PA ABLE Savings Program and providing a head start to education savings with the Keystone Scholars Program.

DESCRIPTION OF WORK

- Responsible for handling incoming calls from prospective and existing account owners.
- Answers callers' questions using background and knowledge of the programs.
- Provides excellent customer service and solutions to help callers save and access their funds when needed.
- Researches information in the proprietary database.
- Makes changes to account information at the request of account owners such as address, telephone number, tuition level, and investment options, as appropriate.
- Places out-calls to collect information from individuals whose written requests are incomplete or unclear.
- Places telephone calls to individuals who have requested informational and application materials, but who have not yet established an account.
- Collects information from individuals who have sent incomplete applications.
- Responds to correspondence and e-mails, as appropriate.
- Identifies any pertinent information relating to the call center and relays that information to the Customer Service Supervisor.
- Identifies public reaction to program elements and changes and relays that information to the Customer Service Supervisor.
- Identifies caller-related impediments to the application process and relays that information to the Customer Service Supervisor.

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- Identifies issues that are particularly compelling to callers and relays that information to the Customer Service Supervisor.
- Performs work of a comparable nature.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

- Physical ability to hear and understand phone callers and to sit at a workstation for prolonged periods of time.
- Ability to articulate clearly and loudly enough to be easily heard and understood on the telephone.
- Ability to take and respond to a large volume of calls in a knowledgeable, pleasant and professional manner.
- Ability to handle disgruntled or angry callers in a manner that defuses the situation and addresses the caller's concern, while adhering to program policy and procedures.
- Ability to document effectively in account files the content of calls regarding the caller's account.
- Ability to identify calls that may provide leads for outreach staff to promote Business, community and School Partners programs and any other approved marketing incentives, to obtain adequate information for outreach staff to follow-up, and to transmit that information for follow-up.
- Good judgment; professional discretion, integrity, and ethics.
- Excellent interpersonal and communication skills including outgoing, persuasive, congenial personality; active listening; being able to help those unfamiliar with the program articulate their questions; social perceptiveness; good reading comprehension; good writing skills; good oral communication skills.
- Ability to acquire in-depth knowledge of Pennsylvania's College Savings Program and ABLE Savings Program, and related topics and ability to effectively convey that knowledge to others.
- Ability to understand, retain and appropriately use all information and resources provided for Customer Service Representatives independently and without the need for repeated supervisory guidance.
- Ability and willingness to work independently with minimal supervision.
- Ability and willingness to work cooperatively and assist other Customer Service Representatives as needed.
- Ability to learn, retain, quickly recall, and explain complex and detailed information.
- Ability to stay focused and on-task while carrying out any work function but especially while communicating with any member of the public.
- Proficiency in using Word, Outlook, and Excel; ability to learn and proficiently use customized computer applications.
- Ability to acquire an understanding of investing including stocks, bonds, and mutual funds.
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- Work experience in the area of finance, sales and/or marketing.
- Work experience in a call center.

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MINIMUM EXPERIENCE AND TRAINING

Bachelor's Degree or Associates Degree in Business or Marketing sales, communications, finance, or similar curriculum; or

Any equivalent combination of education and work experience.

Preferred - Bilingual (Spanish) to provide customer service to Spanish-speaking customers.

WORK SCHEDULE AND ADDITIONAL INFORMATION

Full-time employment: 37.5 hours

Work hours: 8:30AM-5:00PM

Starting Salary: \$44,010

Job Code: T6015

Location: This position is headquartered in Harrisburg. You will have the opportunity to work from home (telework) up to 2 days a week. Management may discontinue the telework arrangement at any time, for any reason. In order to telework, you must have a securely configured high-speed internet connection. If you are unable to telework, you will report daily to the headquarters office in Harrisburg. The location where you perform your telework must be located within the Commonwealth of Pennsylvania.

In addition to the base salary, Treasury offers an attractive benefits package. Benefits include multiple medical plan options; supplemental benefits including prescription, dental and vision insurance plans; retirement plan; optional deferred compensation plan; group life insurance; voluntary insurance programs; and paid leave benefits including vacation, sick and parental.

A perpetual institution, Treasury is proud to engender and facilitate an environment that fosters the personal development, intellectual enrichment, and professional advancement of its employees. Treasury is also committed to creating a diverse and inclusive environment and is an equal opportunity employer. All qualified applicants will receive due consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

CONTACT INFORMATION

For immediate consideration, please submit a resume by February 20, 2024, to: Pennsylvania Treasury Department at careers@patreasury.gov. Questions may be directed to Human Resources at 717-787-5979.

For more information about Treasury, visit www.patreasury.gov.

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