



The Arc New York.  
29 British American Blvd.  
Latham, NY 12110  
(518) 439-8311 • Fax: (518) 439-1893  
www.thearcny.org  
www.nysarctrustservices.org

## JOB DESCRIPTION

<b>Job Title:</b>	<b>Team Leader</b>
<b>Revision Date:</b>	<b>4/2022</b>
<b>Department:</b>	<b>Trust Services</b>
<b>Direct Reports:</b>	<b>None</b>
<b>Reporting:</b>	<b>Customer Service/Records Manager</b>
<b>Status:</b>	<b>Full Time / Non Exempt</b>
<b>Location:</b>	<b>Latham</b>
<b>Travel Required:</b>	<b>None</b>

### **POSITION OVERVIEW**

In addition to the responsibilities outlined in the Data Entry Operator, Records Support Specialist and Customer Service Representative job descriptions, the Customer Service/Records Team Leader will facilitate the workflow in support of the Customer Service/Records Manager and Assistant Manager; will facilitate proper and consistent communication, both internally and externally; will oversee daily Records functions to ensure the timely and accurate preparation and/or review of workflow tasks as assigned.

The incumbent will report to the Customer Service/Records Manager and Assistant Manager.

### **RESPONSIBILITIES**

- Ensures the team's work is processed completely, accurately; correspondence is updated in a timely fashion; communication with beneficiaries as necessary
- Works to resolve escalated calls before requiring the Customer Service/Records Manager or Assistant Manager's attention
- Covers workload of team staff when on leave
- Administers Records processing according to the policies and procedures for the team
- Contributes to review and drafting of policies and procedures
- Communicates daily with management and CS/Records team.
- Researches and resolves problems as needed
- Has primary training responsibilities for all new team members and works on continued development for all team members
- Works on projects assigned by management and/or leadership staff
- Works with management to assess and develop goals for team members
- Participates in interviews as needed
- Other duties as assigned

### **KNOWLEDGE, SKILLS, AND ABILITIES**

**Skills:** Excellent analytical skills and attention to detail, excellent interpersonal and communication skills, and proficiency in Microsoft Office applications including MS Word, MS Excel, MS Access, and MS Outlook required



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Personal Attributes: Ability to learn and understand and communicate complex details regarding NYSARC Trust Services programs. Strong, objective decision-making skills. Ability to prioritize multiple tasks. Exceptional organizational skills and attention to detail. Outstanding interpersonal and problem resolution skills

**MINIMUM REQUIREMENTS:**

- Bachelors Degree with 2 years of related work experience or Associates Degree with 4 years of related work experience.
- All relevant experience will be considered in lieu of above requirement.
- Two or more years of experience working in an office or call center environment
- NYSARC Trust Services experience preferred
- Relevant and proven leadership experience preferred

**CERTIFICATION**

The above statements are intended to describe the general nature and level of work being performed by the incumbent of this job. They are not intended to be an exhaustive list of all responsibilities and activities required of the position.

I certify that I have read and understand the responsibilities assigned to this position.

\_\_\_\_\_ Date: \_\_/\_\_/\_\_  
Employee Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_ Date: \_\_/\_\_/\_\_  
Supervisor's Signature  
Name, Title

\_\_\_\_\_ Date: \_\_/\_\_/\_\_  
Sean Wade, Chief Operating Officer

- Employee File Copy
- Main Office Copy