

GENERAL INSURANCE SERVICES, INC.

JOB DESCRIPTION

Job Description: Client Service & Claims Coordinator
Reports to: Joe Biernacki
FLSA Status: Full-time, non-exempt
Approved by: Joe Biernacki
Date Approved: 09/04/2024

Purpose: The Client Service & Claims Coordinator corresponds with all parties and processes all related documents to provide timely and accurate guidance and service to Commercial Lines clients and advisor. This position also compiles information from various sources to coordinate the claims received and process all necessary paperwork to provide the customers with timely and accurate payment and assistance.

Responsibilities:

- 1. Ensure client satisfaction, growth and retention of business by providing top quality service and problem solving.**
 - a. Respond to all incoming calls, voicemails and emails from clients, ideally within the same day.**
 - b. Issue certificates and bonds.**
 - c. Accept payments, write receipts, upload payment to company and note activity in client account.**
 - d. Change policies, per client request.**
- 2. Process and invoice new and renewal business.**
 - a. Enter submissions/applications for advisor in Epic & Indio.**
 - b. Research certificate requirements. Contact underwriters and determine what can be done at what cost.**
 - c. Process policy change requests from insured. Follow up with company.**
 - d. Process Binders, EPI's, Auto cards, etc.**
 - e. Prepare finance agreements.**
- 3. Document client's account status clearly, accurately and completely to allow others to effectively work the account.**
 - a. Scan and attach all client related items to client's account, including all related items received and information retrieved from company websites.**
 - b. Document all client activity by the end of the business day in an easy to understand manner.**
 - c. Client activity includes any communication by any means, any potential change and progress notes.**
- 4. Correspond with underwriters, insureds and advisors to assure accuracy and policy continuity.**
 - a. Submit applications for renewal business to companies for quoting and policy issuance.**
 - b. Submit change requests to companies or process directly.**
 - c. Follow up on all underwriter requests and coordinate necessary communication with advisor.**
 - d. Obtain quotes from carriers for rewrites and renewals.**
 - e. Send bind requests to carriers.**

- f. Review policies for accuracy and update information and attach in Epic.
- g. Update coverage summaries for client meetings or prepare proposals reflecting quotes for renewals or rewrites.
- 5. Keep up to date on client accounts; retrieve and correct/update data; communicate findings or outcomes to advisors.
 - a. Keep advisor apprised of any outstanding invoices, cancellations or reinstatements.
 - b. Follow up on unbilled and expired accounts. Keep track of expiration report to assure coverage is bound.
 - c. Follow up to assure timely payment. Keep track of aged accounts.
 - d. Retrieve data to assure advisor has adequate time to lock in renewals.
 - e. Run Motor Vehicle Report, as needed.
- 6. Assist advisor and office with day-to-day functioning.
 - a. Process all incoming mail; not limited to audits, bonds, endorsements and endorsement requests, and certificate requests. Scan to client's file and correspond as appropriate.
 - b. Assist advisor by providing quotes, remarketing accounts and correspondence, as requested.
 - c. Financial support may include preparing deposits, typing check requests, opening and locking cash box, and going to the bank.
 - d. Clerical support may include acting as receptionist, accepting client payments, recording/uploading payment, making the bank deposits for the office and picking up/dropping off mail at the post office or another office as needed.
 - e. Provide regular front desk coverage relief.
- 7. Provide claims assistance to commercial accounts.
 - a. Communicate directly and responsibly with customers and claimants.
 - b. Collect and compile all information related to the claim.
 - c. Submit claim information to various parties. Record information and provide reports.
- 8. Attend in person meetings at other GIS offices or outside venues as directed by their manager.
- 9. Performs other related duties as necessary or directed.

Knowledge, skills and abilities:

- 1. Indiana Property and Casualty agent's license is required upon hire or obtained within 3 months of hire.
- 2. A minimum of 3 years of experience in commercial lines account management or service is required.
- 3. High school diploma or GED is required.
- 4. The ability to read quickly with good comprehension; the ability to write using good grammar and punctuation and precise mathematical skills.
- 5. Outstanding etiquette and excellent verbal skills to express compassion under stressful situations.
- 6. Empathic listening skills and careful speaking skills.
- 7. Professionally maintains confidential information.
- 8. A thorough knowledge of the phone system, including the ability to transfer calls and to conference call.
- 9. The ability to use Outlook to send and receive emails including attachments.

10. The ability to utilize the in-house software systems within 60 days of employment. These skills include using the Genifax, scanning and attaching appropriate items in AMS, and company websites.
11. Ability to understand, memorize, retain, and carry out oral or written instructions.
12. Ability to work alone with minimum supervision and with others in a team environment.
13. Ability to work rapidly for extended periods and on several tasks at the same time.
14. Ability to work effectively with frequent interruptions.
15. Ability to occasionally work extended, evening hours.
14. Ability to communicate effectively and maintain composure when dealing with irate/emotional individuals.

Physical Demands and Working Conditions

- Communication with telephone callers and associates requires an ability to express oneself as well as perceive and exchange ideas.
- Viewing computer terminal, perceiving and transcribing data with accuracy and keyboarding fill much of the day in an office environment.
- The employee is not exposed to adverse environmental conditions, working primarily in an office environment.
- Sedentary work. Exerting up to 10 pounds of force occasionally and/or negligible amount of force. Work can require stooping, kneeling, crouching, as well as grasping objects, and reaching with hands and arms.
- The employee is occasionally required to stand and walk.
- Reliable physical attendance is required.

I have reviewed the Client Service & Claims Coordinator job description with my supervisor. By signing below, the employee acknowledges that they are aware of the scope, responsibilities and requirements of this position.

Employee's Signature: _____ Date: _____

Supervisor's Signature: _____ Date: _____