



## Job Description

<b>Job Title</b>	Policy Services Specialist	<b>Original Date</b>	September 2016
<b>Department</b>	Operations	<b>Revision Date</b>	May 2022
<b>Reports to</b>	Policy Services Lead	<b>Position Type</b>	Full-time/Hourly
<b>Exempt Status</b>	Non-Exempt	<b>Commissionable - No</b>	<b>Bonus - Yes</b>

**JOB SUMMARY:** As a member of the Operations team, the Policy Services Specialist is responsible for maintaining and updating policies Process applications for, changes to, reinstatement of, and cancellation of policies. Duties include reviewing insurance applications to ensure that all information has been gathered and questions answered, changing policy records to conform to insured party's specifications, canceling insurance policies as requested by agents and insured and verifying the accuracy of insured company records. Attends to department phone calls and email support.

### CORE VALUES BEHAVIORS TO MEASURE PERFORMANCE

Communicates Effectively, Demonstrates and Promotes Teamwork, Builds, Maintains and Leverages Relationships, Builds Professional & Personal Growth, Demonstrates Commitment to Excellence and Servant Leadership.

### KEY RESPONSIBILITIES

- Process, record and maintain workflow tasks from ALIS document manager accurately and efficiently daily.
- Index correspondences and assign tasks to appropriate people to ensure timely and accurate processing.
- Field and document customer interactions in the proper systems to ensure continuity of information.
- Setup new business files and follow-up for additional information as requested by underwriting.
- Process endorsements, NOC's, non-renewals, and reinstatements daily.
- Follow-up on additional information requests for renewals, endorsements, and other policy maintenance processes.
- Modify, update, and maintain existing insured policies as needed.
- Ensure service levels within the team and department are met or exceeded daily.
- Remain knowledgeable of key processes, business initiatives and internal resources to assist stakeholders in accomplishing goals.
- Other duties as assigned.

### EDUCATION, EXPERIENCE, LICENSURE & CERTIFICATION

- High School Diploma or GED.
- 2+ years of experience in a customer service-related field desired.
- Strong technical and keyboarding skills with experience.

### KNOWLEDGE, SKILLS & ABILITIES

- Ability to provide friendly service to handle inquiries from agents and internal/external customers.
- Must have a high level of problem-solving and organizational skills and be a positive, team player.
- Ability to cope in a fast-paced environment.
- A good listener with sound judgement.
- Basic math skills to add, subtract, multiply or divide quickly and correctly.
- Excellent multi-tasking, effective interpersonal and communication skills (oral and written).
- Attention to detail in composing, typing, and proofing materials, establishing priorities and meeting deadlines.
- Strong data entry and PC skills using company systems and Outlook.
- Ability to understand insurance basics to expand understanding of agent and customer needs and enhance phone and email support for all lines of coverage.
- Punctual always and able to put in flexible working hours.

**SYSTEMS:**

- Microsoft Office 365
- Monster phone system
- ALIS Agency Management System
- CGA Website including company online rating systems; make a payment, submit a claim
- Policy Viewer, SQL
- Summary Detail Reports
- Vertifore

**SUPERVISORY RESPONSIBILITY:** This position has no supervisory responsibilities.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to talk or hear and must have the ability to see details at close range. The employee frequently is required to sit for extended periods of time and will require the use of hands and fingers to handle or feel; move about the office/facility. Some light physical effort is required.

**TRAVEL:** No travel is expected for this position.

**WORK CONDITIONS AND WORK ENVIRONMENT:** This job operates in a professional office environment or home office setting. Work is performed in a temperature-controlled, non-smoking office. The noise level in the work environment is usually quiet. This role routinely uses standard office equipment such as computers, phones, printers/photocopiers, scanners, and fax machines.

**GENERAL NOTES:** This job description is not intended to be all-inclusive, additional details will be specified by the manager/supervisor. The employee will also perform other reasonable business duties as assigned by the manager/supervisor. Management reserves the right to change this job description, job responsibilities, duties, and working hours as needs prevail, with or without notice.

If requested in accordance with applicable law, the Company provides reasonable accommodation to known physical and mental limitations of an otherwise qualified employee with a disability to allow him/her to perform essential functions of the job unless the accommodation would impose an undue hardship on the Company.

The Company is an at-will employer. This job description is a guideline and does not constitute a written or implied employment contract.

I have read and understand this job description. I agree to accept the responsibilities and duties as outlined.

**Employee Acceptance**

**Date**

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