

POSITION TITLE: Commercial Lines CSA/Assistant
REPORTS TO: Commercial Lines Manager
FLSA: Non-Exempt

SUMMARY:

The Commercial Lines CSA/Assistant will assist the commercial lines account manager by processing changes, renewals, audits, cancellations, reinstatements rating, making calls to clients or company or in any other area as instructed by the AM and will assure correct information is input into automation system. CSA/Assistant will have a small book of business of their own to take care of.

ESSENTIAL FUNCTIONS:

- Process new policies, renewals, endorsements, certificates and audits verifying all information and premium are as requested from designated AM. Enter detailed information into Sagitta system following agency procedures.
- Process renewals following agency standards. Contacting insured for updated renewal information at least sixty (60) days in advance; review coverages; order loss runs; complete application: rate as required; prepare proposals; update information in Sagitta, issue binders; verify incoming policies and invoice for accounts assigned to the AM/assistant. Assist producers as directed during renewal process.
- Re-market renewals, contact clients, and handle other renewal activities in coordination with the producer(s). Review renewals to determine if coverage can be rewritten in a special program when necessary.
- Invoice all commercial premium transactions during the month, following agency procedures and guidelines.
- Maintain files in an orderly, up-to-date manner. Send all current file information (new, renewals, endorsements, audits, cancellations etc.) to scanning.
- Prepare binders, certificates (set up masters), account summaries (to include premium and loss experience as well as coverage), endorsements, policies, lost policy releases and account balance status when requested on non service enter accounts. Ensure that these items are delivered and/or mailed to client. Initiate own correspondence with companies and clients.
- Assist clients with service needs making changes to existing accounts, answering coverage questions and providing documentation of the changes to them. Work with the carriers to ensure clients requests are handled properly.
- Maintain own follow-up and suspense file on outstanding orders, correspondence, audits, reports, reporting form coverage, claims and follows up on overdue and suspense items. Maintains expiration control log.

- Handle prompt review of all audits with recognizing agency must process and guarantee collection of all audits. Arrange for corrections with customer and company to protect collection.
- Maintain files in an orderly, up-to-date manner. Send all information to Scanning to eliminate as many paper files as possible.
- Prepare summaries of insurance, schedules and proposals as needed for account review. This is done on an as needed basis.
- Prepare Bonds, and process renewals of same when necessary.
- Assist in premium collections. Identify and correct accounting issues .
- Determine reasons for requests for cancellations; act to save accounts; notify producer(s) according to agency standards.
- Process and follow up on cancellation request to carriers to ensure accurate and timely resolution; maintains agency financial equity whenever possible.
- Refer current clients to life/benefits department and to personal lines for solicitation of those lines of business; assists in profiling the commercial book of business for marketing purposes.
- Perform all actions relating to the public, customers and companies in a manner that will avoid issues involving potential errors and omissions.
- Participate in seminars and other training to maintain required licenses and for knowledge and skill development.
- Keep producers fully informed of important activities on their account
- Process change requests
- Print auto ID cards.
- Process change confirmations.
- Process confirmed cancellations.
- Process Finance Agreements.
- Process Notary Bonds.
- Process certificates of insurance.
- Maintain working knowledge of all company change procedures.
- Perform all actions relating to the public, customers and companies in a manner that will avoid issues involving potential errors and omissions.
- Process paperwork assigned by AM.
- Participate in seminars and other training to maintain required licenses and for knowledge and skill development.
- Perform other duties as requested.

MARGINAL FUNCTIONS:

- Assist or fill-in for AM as directed.
- Train other employees.
- Backup in other processing areas such as incoming/outgoing mail and switchboard.

KNOWLEDGE, SKILLS AND ABILITIES:

- Must be a self-starter, imaginative, well organized, with good communication skills both verbal and written.
- Should have some understanding of commercial lines underwriting and coverages.

OTHER REQUIREMENTS:

- High School graduate.
- Prior automation/computer experience a must with some insurance knowledge.
- Maintain Property/Casualty License and comply with continuing education requirements.
- Ability to perform 80% sedentary work exerting up to 10 pounds of force occasionally and negligible force frequently.

WORKING CONDITIONS:

Fast-paced multiple tasking environment, high disruption environment.

JOB PERFORMANCE STANDARDS:

This job description is intended to describe the level of work required of the person performing the job, and the physical requirements normal to the position. Essential functions are outlined; other duties may be assigned as needs arise or as required to support the essential functions. Specific performance objectives will be developed each year to measure performance.

REASONABLE ACCOMMODATIONS:

This description is not intended as a contract and is subject to change and revision. Any written contractual agreements will supersede this job description. All requirements may be modified to reasonably accommodate physically or mentally challenged employees.

EMPLOYER'S RIGHTS:

This job description does not list all the duties of the job. You may be asked by your supervisors or managers to perform other duties. You will be evaluated in part based upon your performance of the tasks and functions listed in this job description.

The employer has the right to revise this job description at any time. The job description is not a contract for employment, and either you or the employer may terminate employment at any time, for any reason.

Date prepared: 2-19-07

Approved by: _____

Employee: _____

Date: _____

02-19-07