

Job Description

Position Title: Underwriting Support Specialist

Eligible for Commission: Yes No

Department: Risk Selection

Reports to: Chief Underwriter

Classification: Exempt Non-Exempt

Eligible for Telecommuting Consideration: Yes No

Summary/Objective

This position is both administrative and technical. Under direct supervision the incumbent supports the underwriting staff on new or renewal business by gathering, processing, and entering information needed in order for the underwriting staff to reach a decision. Gathers and organizes information and reports (e.g., medical records, risk assessments, and other medical requirements) that support the underwriting decision. Employee may assist the Underwriter with the computation of rates and premiums and may review incoming insurance applications for accuracy and completeness. Position requires knowledge of company products, the ability to interpret policy provisions, and knowledge of administrative practices relating to company procedures. Maintains workflow and quality control in accordance with established procedures and guidelines. Has typically progressed from lower-level position and typically has attained or has completed courses required for industry designations.

Essential Functions

- Manages numerous websites to order requirements, to include managing MIB information.
- Reviews applications for completeness and required forms, reports challenges to SVP/Chief Underwriter.
- Build electronic application/underwriting file for the underwriter and perform workflow duties as required.
- Orders medical requirements or medical records via internet, phone or fax via various paramedical vendors and physician offices. Follow-up on regular basis to make sure requirements are received in a timely manner.
- Sends cases to reinsurance provider(s) as directed by underwriter.
- Assists with reconciliation of invoices from vendors for prior approval for payment.
- Key essential reinsurance data to ID3 administration system.
- Update ID3 notes with underwriting status and provides status updates to agents and management as requested.
- Assists in Risk Selection Department as needed.

Competencies

- Accountability
- Coachable
- Communication(Oral & Written)
- Computer Skills-Basic
- Customer Oriented/Service
- Job Knowledge
- Problem Solving
- Quality Output
- Team Mindset

Supervisory Responsibility

This position has no supervisory responsibilities.

Work Environment

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, and fax machines.

Physical Demands

This is a largely sedentary role, must be able to remain in a stationary position at least 50% of the time. Filing, printing, faxing, scanning and copying is required; this requires the ability to move about the office and position self to access equipment and file cabinets, transport items (files, box of paper, etc.) weighing up to 20 lbs., and ascend/descend step ladder/stool as necessary. The position requires extended hours in front of a computer

screen and operation of a computer and other office equipment such as a calculator, and copy machine. This position requires the ability to communicate and exchange accurate information via telephone and in person.

Hours of Work

This is a full-time position. Regular office hours are Monday through Friday, 8:00 a.m. to 5:00 p.m., Friday 8:00 a.m. to 3:00 p.m. Occasional evening and weekend work may be required as job duties demand. This position requires face to face and in-person interaction and requires the incumbent to be in the office during regular office hours to access information kept on-site.

Travel

No travel is required for this position.

Required Education and Experience

- Some College or Insurance Certification or License
- LOMA Level 1 Certification (281 & 291), required as part of initial training plan
- Minimum two years related experience

Preferred Education and Experience

- College or University Degree in related area
- Professional Industry Designations i.e., FLMI, CLU, RICP, FIC, LUTCF
- Bilingual (English/Spanish)
- Minimum one year of experience with Catholic Life Insurance

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice. Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Signatures

This job description has been approved by all levels of management:

Supervisor/AVP/VP _____ Date _____

HR _____ Date _____

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____