



## Senior Account Manager/Account Manager - Benefits

### JOB DESCRIPTION

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#### **Position Description**

The candidate will handle all medical/dental/vision claims submissions from start to final resolution of claim, which includes follow-up phone calls to Insurance Carriers and Medical/Dental Providers to insure that claim is resolved. All correspondences from Insurance Carriers and Medical/Dental Providers will need to be addressed in a timely manner; as this could result in claim denial or Client and his/her dependents losing their Health coverage.

#### **Duties and responsibilities include, but are not limited to:**

- Assist the Team Leader/Producer with the development, implementation and servicing of new and existing employee benefit accounts.
- Responsible for managing a portfolio of assigned accounts and ensuring high quality customer service is provided at all times.
- Assist in the group renewal and acquisition process by developing proposals and presentations.
- Handle client questions and issues including application processing, enrollment, benefit changes and claims.
- Must keep updated with carrier communications and new coverage options.
- Must be able to market a new account and prepare an accurate proposal for Team Leader/Producer to deliver to the client.
- Must be able to communicate with carrier representatives when needed.
- Must be able to effectively manage time, understand priorities and communicate potential problems.
- Ensure the timely and accurate production/processing of:
  1. Invoices and related policy accounting documentation;
  2. quotations;
  3. Premium and adjustment calculations;
  4. Information and documentation for Pre-Renewal and Renewal meetings;
  5. Policy Booklets and Client Binders;
  6. Placing all correspondence in EPIC and maintaining the expiration report on a daily basis;
  7. Current and outstanding documentation follow ups;
  8. All other documentation.
- Possess a thorough understanding of all major classes of insurance, which the Company offers to its clients;
- Comply fully with the Company's errors and omissions policy;
- Overtime may be required from time to time

#### **Physical Actions**

Required job duties are essentially sedentary work consisting of occasional walking, standing and lifting and/or carrying 10 lbs. maximum.

### **Education Requirements**

- High School Diploma, college degree preferred.
- Current California Life & Health License, recommended.

### **Experience Requirements**

- Employee benefits experience
- Experience with claim resolution.
- Must have experience with MS Office Suite (Word, Excel, Outlook)
- Agency Management System (i.e., EPIC, AMS 360) or other paperless computer system, preferred.

### **Special Skills Requirements**

- Strong written and verbal communication skills
- Strong follow up skills
- Interpersonal, analytical, problem solving abilities.
- Organizational and time management skills.
- Results oriented, work under pressure, meets deadlines
- Fosters a customer service orientation
- Sound problem solving skills
- Consistent exercise of good judgment
- Prioritize and complete multiple tasks simultaneously
- High integrity
- Work independently and with a team.