

Insurance Processing Clerk

Summary

Duties include reviewing insurance applications to ensure that all questions have been answered, compiling data on insurance policy changes, changing policy records to conform to insured party's specifications, compiling data to verify the accuracy of insurance company records.

Knowledge

- Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Clerical — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, designing forms, and other office procedures and terminology.
- Computers and Electronics — Knowledge of electronic equipment and computer hardware and software, including applications and programs.

Skills

- Active Listening — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Speaking — Talking to others to convey information effectively.
- Reading Comprehension — Understanding written sentences and paragraphs in work related documents
- Writing — Communicating effectively in writing as appropriate for the needs of the audience.
- Interacting With Computers – Using computers and computer systems (including hardware and software) to enter data, or process information
- Getting Information – Observing, receiving, and otherwise obtaining information from all relevant sources.
- Communicating with Persons Outside Organization – Communicating with people outside the organization, representing the organization to customers, the public, and other external sources. This information can be exchanged in person, in writing, or by telephone or e-mail.
- Processing Information – Compiling, categorizing, calculating, or verifying information or data.
- Establishing and Maintaining Interpersonal Relationships – Developing constructive and cooperative working relationships with others and maintaining them over time

Tasks

- Take client calls to provide customer service and obtain information.
- Correspond with insured or agent to obtain information or inform them account status or changes.
- Examine letters from policyholders or agents, original insurance applications, and other company documents to determine if changes are needed and effects of changes.
- Compose business correspondence for supervisors, managers and professionals.