EMG
Insurance Brokerage
An Insurance Designers member since 1987

Employee Job Description

Name:	
Job Title:	Case Coordinator
Department:	Administrative Staff-Life New Business
Classification:	Full-Time / Non-exempt
Reports To:	Paula Aguilera – Director, Operations/New Business

Position Overview/Summary (Basic purpose of the job): To act as liaison between the agent and carrier to ensure applications move along in a timely fashion from the point of sale to the point of placement by following up and managing new business submitted.

Principal Duties and Responsibilities (Essential Job Functions):

* Act as a new business liaison between agents and 25+ insurance carriers
* Understand life, long-term care and disability insurance
* Confidently and accurately handle a minimum of 150 policy case load with thorough results
* Ability to work remotely, if needed, with minimal supervision with timely, thorough, and complete results
* Maintain department service standards: Follow up on cases every 3 days with current notes/requirements/documents until placed or closed; return calls within 2 hours; respond to emails within 4 hours
* Understand and stay consistently apprised of all carrier products; carrier underwriting guidelines; and new business procedures, processes or deadlines
* Assist agents over the phone (or in person as needed) with carrier forms; underwriting requirements; or other inquiries
* Resolve case issues quickly and efficiently with minimal disruption to the agent or client; defer major issues to Director of Operations for assistance
* Work closely with internal Contract & Licensing department to ensure agent appointment is processed in coordination with the application
* Enter applications into database as needed
* Order and/or follow up on exams, APSs and other underwriting requirements as needed
* Thoroughly understand agency and carrier E-tickets (I-Go, Express Complete) from submission to delivery; effectively assist agents or directors with this process
* Run general term quotes; seek guidance from director or Sales Support for quotes/illustrations on cases approved other-than-applied-for
* Thoroughly review policies at time of issue and forward to agent promptly
* Process delivery requirements promptly to ensure timely agent commission payout
* Process policy increases and conversions
* Participate in monthly carrier webinars
* Complete NAILBA Certified Case Manager course and/or other required case manager education courses; and maintain case manager continuing education.

* Other projects as assigned by Director of Operations or other upper management

Misc. Job Duties (Non-essential Job Functions):

* Available to work overtime as business needs arise
* Work as a team to keep Case Management manual up-to-date
* Maintain a professional attitude in all communication
* Ability to communicate patiently and effectively both verbally and written
* Ability to maintain confidentiality and follow HIPAA regulations
* Thinking ahead or outside the box; heading off potential problems
* Willingness to consistently grow, learn, and accept changes; take constructive criticism
* Develop and maintain close professional relationships with carrier Underwriting and New Business departments to ensure faster turnaround times
* Ability to navigate the internet or carrier website for information
* Openly communicate with team members and share knowledge

Skills/Requirements/Qualifications (To perform the job):

* Clean background check
* H.S. Diploma or GED
* Knowledge and understanding of life insurance terminology/processes
* A quick, detailed and accurate learner
* 2 + Yrs brokerage agency or dedicated new business experience
* Efficient time management and organizational skills to include the ability to efficiently multi-task under time constraints
* Dependable, accountable team player with positive outlook with a willingness to help others
* Excellent organizational and deductive reasoning skills
* Solid and proficient knowledge of Microsoft Office: Adobe, Word, Outlook and Excel
* Agency CRM software knowledge: Smart Office/PaperClip preferred, but not required