

# HMS Insurance Associates, Inc. Commercial Lines Department

## **Job Description**

**Title:** Customer Service Representative

**Reports to:** Unit Leader

### **Description of Responsibilities:**

The Customer Service Representative (CSR) provides day-to-day service to policyholders, fellow employees, and insurance carriers. The CSR is responsible for helping the team and HMS achieve growth and retention objectives by providing timely, accurate and professional service to all customers.

### **Key Duties & Accountabilities:**

#### **Consistent Quality Service to Clients and Customers**

- Respond to request from customers for driving records, loss runs, billing information, etc.
- Respond to request from carriers.
- Checking and up-dating Order List
- Maintain accurate policy detail for claims department.
- Respond to accounting differences.
- Dead File procedure followed.
- Document management procedures followed.

#### **Accurate timely processing of:**

- Certificates, FR-19's, Auto ID cards, Binders
- Endorsements and Audits
- Certificates/Evidence processed
- Endorsements checked and invoiced
- Audits checked & invoiced (Direct Bill)

#### **Managing the cancellation process**

- Contact Carrier and customer prior to cancellation date
- Follow procedures and notify Producer and Account Manager

#### **Handling the Renewal Process** – provide team with accurate information and meet deadlines

- Expiration list generated
- Applications issued and given to the producer
- Loss Runs obtained/ordered, request updates for vehicles, drivers, equipment, etc
- Proposal completed by “need by date”. Issue Binders, ID cards, Certificates

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### **Qualifications:**

- 1) Maryland State Property & Casualty Producer license preferred. If new to insurance, license must be obtained after 90 days.
- 2) High School diploma required. Bachelor's degree preferred.
- 3) Strong customer service focus
- 4) Solid written and verbal communication skills
- 5) Organizational skills to successfully handle multiple tasks
- 6) Details oriented to ensure accuracy
- 7) Excellent listening skills
- 8) Demonstrated problem solving skills to resolve customer service issues
- 9) Good typing and data entry skills
- 10) Solid computer skills. The ability to navigate various systems, and use Microsoft Word and Excel.
- 11) Demonstrated ability to function effectively as part of a team in a sales environment.