



Position Information

Employee Name:

Position Title:

Customer Service Representative

Program:

Specialty Operations Underwriting

Work Unit:

Classification:

Workers' Compensation Insurance Technician

Report To:

Manager I, SCIF/ Manager II, SCIF

Collective Bargaining Identifier (CBID):

R01

Fair Labor Standards Act (FLSA) Status:

Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Program Information:

The Specialty Operations Program oversees State Fund's complex underwriting segments, including Large Accounts, Middle Market, PEO/Temp, USL&H, ADR, and other specialized disciplines. The Program ensures strategic alignment with corporate priorities, drives operational excellence across all underwriting functions, strengthens market presence, and contributes to State Fund's financial stability and long-term competitive position.

Purpose/Scope:

Under supervision and with guidance from the team senior and/ or executive underwriters, the incumbent will perform the more routine underwriting tasks and be responsible for the least complex functions of an underwriting unit. The Workers' Compensation Insurance Technician, Customer Service Representative, serves to provide the necessary services to effectively administer the department's underwriting and support function.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders

- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

45% Essential

- 1. Assist Underwriters in reviewing, processing new and renewal business for an assigned book of business in compliance with Corporate Underwriting and Marketing advisories, guidelines and procedures. Upon broker/direct assignment, underwrite, quote and process non-scheduled rated accounts.**
 - a. Prioritize, review and prepare applications and all required questionnaires for valid submission.
 - b. Monitor conversion policies to achieve timely renewal generation.
 - c. Coordinate with Treasury to prepare and process banking and 6505 form for IP and Installment payment.
 - d. Obtain review and approval of submission for transmission to mainframe.
 - e. Complete and process manual input documents when policy is not created on quoting system via WISP.
 - f. Scan viable documents to policy file.
 - g. Upon broker/direct assignment, quote non-scheduled rated accounts and ensure quality work product.
 - h. Process valid bind orders to bind and create a policy on State Fund systems.

30% Essential

- 2. Provide policyholder service and maintenance on assigned book of business.**
 - a. Review and process policy corrections, changes, endorsements, cancellations, reinstatements, suspense list, policy alerts, unclaimed property and generate/complete necessary documents and/or forms relating to respective underwriting transactions.
 - b. Provide and document timely responses to servicing inquiries from brokers, policyholders, and other departments.
 - c. Review and assign proper classification and data entered in Notification of Temporary Client Letters.
 - d. Assist Underwriter in compiling information and researching responses on servicing issues or policy corrections.
 - e. Coordinate with Underwriter to address and resolve disputes and complaints.
 - f. Document in a timely manner servicing and maintenance activities in policy Activity Log.
 - g. Complete requests for policy changes and updates timely.
 - h. Develop and maintain effective working relationships with coworkers, policyholders, brokerages and the general public while conducting State Fund business.
 - i. Maintain department logs and mailboxes timely.

15% Essential

- 3. Assist Underwriters, Marketing Representative and Management in responding to broker and/or policyholder's inquiries.**
 - a. Keep Underwriter and Marketing Representative apprised of Underwriting and servicing issues from brokerages and policyholders, utilizing established communication procedures.
 - b. Develop and maintain broker and policyholder relationships.
 - c. Provide professional public relations and customer service.
 - d. Maintain effective and ethical relationships by adhering to Core Values, EDGE and North Star principles with internal and external stakeholders while conducting State Fund business.
 - e. Participate in brokerage and policyholder outreach.

- 5% Marginal
- 4. Participate in training to gain and maintain current knowledge of corporate underwriting and marketing advisories, guidelines, procedures, programs and systems.**
- a. Complete all mandatory trainings including, but not limited to, Underwriting, Code of Conduct, Conflict of Interest, and Ethics in a timely manner.
 - b. Maintain a safe working environment including compliance with State Fund's IIPP.
 - c. Maintain knowledge of State Fund underwriting and marketing advisories, guidelines, and procedures
- 5% Marginal
- 5. Participate in, or assist with, special projects as requested by management.**
- a.

100%

Required Knowledge Areas:

- Working knowledge of State Fund underwriting, marketing advisories, policies, and procedures
- Working knowledge of State Fund standard software applications.
- General understanding of various State Fund functions as they impact underwriting and marketing
- Working knowledge of the State Fund organization, Regional Office, and Corporate functions
- Working knowledge of the technical key elements in underwriting an insurance policy.

Required Skills and Abilities:

- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".
- Ability to achieve results according to objectives.
- Ability to provide training
- Ability to manage multiple projects and tasks.
- Ability to evaluate information and analyze data to support and defend decisions
- Ability to effectively work with and relate with other people.
- Ability to provide exceptional customer service

Work Environment:

Physical Requirements:

- Incumbent works in the usual office environment.
- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.

Travel:

- Travel to various work sites and locations for training and/or meetings.
- Travel may occasionally be from overnight to five days in duration.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.

Emergency call backs:

- Not applicable.

Work Hours:

- Maintain a work schedule that supports operational needs

Supervisor's Statement: I have discussed the duties of the position with the employee

Supervisor Name (Print):

Supervisor Signature:

Date:

Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy

Employee Name (Print):

Employee Signature:

Date: