



Position Title	Department	Reports to
Commercial Claims Advocate	Property & Casualty	Rob Darby, Claims Manger
Employment Status	FLSA Status	Created Date
<input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time	<input type="checkbox"/> Nonexempt <input checked="" type="checkbox"/> Exempt	2023.08.21

### Position Summary

To provide advocacy to both internal and external clients of the firm in relation to Commercial Insurance Claims. Assist commercial clients in reporting claims and provide support should a problem occur. Maintain loss history records, documents and communications relating to Commercial Insurance Claims.

### Essential Duties and Responsibilities

The essential functions include, but are not limited to the following:

### Essential Functions

- Review insurance policy to determine the coverage in conjunction with the Client Executive and Account Executive
- Prepare insurance claims forms and related documents and review them for completeness
- Transmit claims to proper carriers for notification and handling
- Provide customer service such as limited instruction on proceeding with claims or referrals to auto repair facilities or local contractors
- Maintain loss history and notes in the agency management system (EPIC)
- Follow up on claims as necessary
- Act as liaison between insured/claimant and insurance company providing adjusters with appropriate coverage information
- Provide back up to self-insured claims administration
- Provide back up for Select and Personal Lines claims

### Other

- Perform your job in such a manner that other employees will consider it a pleasure and privilege to work with you
- Offer innovation and process improvements where possible to help with agency wide improvements and efficiencies
- Regular and timely attendance is an essential function of the job.
- Perform other duties as assigned

### Minimum Qualifications (Knowledge, Skills, and Abilities)

- High School Graduate or General Education Degree: Required
- Experience in Commercial Insurance Claims: Required

- Ability to understand policy forms, coverage descriptions, and the firm’s procedures
- Ability to use logical reasoning to identify the strength and weakness of alternative solutions, conclusions, or approaches to problems
- Familiar with Microsoft Office (Word, Excel, Outlook, etc.)

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodation may be made to enable individuals with disabilities to perform the functions.

While performing the duties of this position, the employee is regularly required to talk or listen. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand, walk, sit, and reach with hands and arms. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this position include close vision, distance vision, peripheral vision, and the ability to adjust focus. The noise level in the work environment is usually moderate.

**Note**

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.

Reviewed with employee by

Signature: \_\_\_\_\_ Name (print): \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Received and accepted by

Signature: \_\_\_\_\_ Name (print): \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_