



Intercare Insurance Solutions Job Description

Job Title:	Account Representative	FLSA Status:	Over-time Eligible
Office Location:	Intercare Insurance Solutions	Division:	Employee Benefits
Department:	Employee Benefits	Date:	2009

Summary:

Provide support to the sales team by performing the following duties.

Essential Duties and Responsibilities:

- Serve as client day to day contact for questions and issues.
- Respond to all phone calls and inquiries no later than 24 hours after receipt.
- Educate clients on all Value Added Services.
- Create employee benefit booklets, using Publisher software. Prepare benefit packets.
- Develop Open Enrollment presentations using Power Point.
- Assist with Open Enrollment presentations and conduct Benefits Webinars for both employees and HR Managers.
- Create Member Service ID cards as needed, with flyer.
- Assist with preparing proposals including, preparing census, entering and updating pivotal information as needed, on-line quoting, and Marketing a group when requested.
- Order supplies from carriers, and review for accuracy.
- Prepare master group files, and prepare client contact sheet.
- Daily maintenance including filing as needed, and maintaining carrier files.

Competency:

To perform the job successfully, an individual should demonstrate the following competencies:

- Team Work - Supports everyone's efforts to succeed.
- Written Communication - Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.
- Initiative - Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for and offers help when needed.
- Quality Management – Demonstrates attention to detail.



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Qualification Requirements:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

Associate's degree (A. A.) or equivalent from two-year college or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience.

Language Skills:

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of organization. Bilingual is a plus.

Math Skills:

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals.

Reasoning Ability:

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

Computer Skills:

To perform this job successfully, an individual should have knowledge of Word Processing software; Spreadsheet software; Project Management software and Database software.

Certificates and Licenses:

Valid TX Life & Health Insurance License desired.

Supervisory Responsibilities:

This job has no supervisory responsibilities.

Physical Demands:

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

- While performing the duties of this Job, the employee is regularly required to talk or hear. The employee is frequently required to stand; walk; sit and use hands to finger, handle, or feel.
- The employee must occasionally lift and/or move up to 10 pounds.
- Specific vision abilities required by this job include Close vision and Distance vision.

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.