**Job Title:** Insurance Assistant I  
**FLSA Category:** Non-Exempt  
**Department/Group:** Commercial Lines  
**Salary Range:**  
**Location:** All VMI locations  
**Reports to:** Commercial Lines Service Manager

### JOB SPECIFICS

#### JOB SUMMARY:
The Insurance Assistant I will provide technical support to department personnel in processing all commercial lines business. Such serving will include verbal and written communication internally with staff and externally with current clients on certificates and ID card requests, correspondence and other office support activities.

#### JOB REQUIREMENTS:
One or more years of general office administrative experience with varying duties including, but not limited to correspondence, reports, filing and other support activities. Must have good organizational skills; detail oriented. Good written (grammar, punctuation, sentence structure) and verbal communication skills. Must have demonstrated experience working with MS office, Word and Excel. Ability to work under pressure to meet deadlines. Good interpersonal skills with proven ability to work well with others. Must maintain a professional appearance and positive attitude.

#### ENVIRONMENT:
Professional business environment. Monday through Friday- 40 hour work week. Schedule to be determined by Manager.

#### DISCLAIMER:
The above statements are intended to describe the general nature and level of work being performed by people assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

### ROLE AND RESPONSIBILITIES

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Area</th>
<th>Description</th>
<th>Essential Function</th>
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<tbody>
<tr>
<td>50%</td>
<td><strong>Client/Policy Services:</strong></td>
<td>Prepares accurate, properly completed certificates of insurance; confirms existence of coverage certified; checks for and secures missing information and authorization when necessary. Prepares accurate, properly completed auto ID cards; processes new business and renewal certificates, auto id’s, endorsements, cancellations and audits. Prepares renewal files and renewal kits including ordering of loss runs and loss summaries. Assists in following up on late payments. Pulls thru proposals. Any special projects as assigned by Service Manager.</td>
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<tr>
<td>10%</td>
<td><strong>Office/Administrative Services:</strong></td>
<td>Prepares or assists with correspondence/reports/other documents/special projects as needed. Performs general office/administrative functions including, but not limited to file maintenance, photocopying, scanning, sending and receiving facsimile transmissions; telephone support and other projects as required; utilization of appropriate software and databases.</td>
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<tr>
<td>15%</td>
<td><strong>Service Standards:</strong></td>
<td>Ensures compliance with all commercial lines service standards and procedures including daily</td>
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service and building relationships with clients and with insurance companies.

| 15% | **Teamwork:**  
| Working together with team and with other departments, such as Marketing, Accounting, Claims, Producers, etc.; Manages their PTO to work with departmental needs.  
Volunteers to back up and/or assist others as needed. | Essential Function |

| 10% | **Determination:**  
| Commitment and initiative to meet department, agency, education and career path goals as set forth in the HIG University program. | Essential Function |

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