



ROLE	CLAIMS ASSISTANT
REVISION DATE	AUGUST 31, 2020
FUNCTION GROUPS	CLAIMS & OPERATIONS
REPORTS TO:	VICE PRESIDENT OF OPERATIONS & CLAIMS
ROLE SUMMARY	The Claims Assistant performs administrative and clerical tasks that facilitate an efficient and effective insurance claims process and that support and compliment the work of the claims team. The Claims Assistant will also be responsible for adjusting claims of low complexity; such as theft, vandalism, glass breakage, medical payments, comprehensive, collision and storm losses.
ESSENTIAL FUNCTIONS	<ul style="list-style-type: none"> • Sets up and enters new claims into claims management system. • Inputs and reviews notes/diaries in claims management system as instructed. • Processes indemnity and expense payments. • Processes and scans mail; index documents in the claims management system. • Reviews, prepares, creates, and/or sends letters, reports, and claims forms. • Answers and initiates telephone calls to agents, insureds and claimants, and may provide customer service support as required. • Investigate, evaluate, and adjust low complexity claims. This will include reviewing policy forms to confirm coverage, determining legal liability, and establishing adequate reserves. • Other activities and projects as assigned that will support the claims team and Company.
PERFORMANCE CRITERIA	<p><u>CRITICAL SUCCESS FACTORS:</u> In order to succeed in this role, it is imperative that this team member do the following:</p> <ol style="list-style-type: none"> 1) Reflect Mennonite Mutual's core values in all aspects of role. <ul style="list-style-type: none"> - <i><u>Best in Class Mindset:</u> Should be oriented toward perpetually pursuing best approaches and solutions to performing job duties and related functions.</i> - <i><u>Relationship Driven:</u> Should be naturally inclined to create and nurture strong, healthy personal connections that deepen trust and understanding in a business environment.</i> - <i><u>Attitude of Service:</u> Must have a low self-orientation, proactively placing the fulfillment of the needs and concerns of others above one's own.</i> - <i><u>Stewardship of Resources:</u> Should be inwardly compelled to invest one's time, energy, talents and passion in ways that maximize our value for policyholders, partners, team members and the communities in which we serve.</i> 2) Ensure fair, equitable and consistent claim settlements for low complexity claims. 3) Process claims components in a timely manner.



	<p>4) <i>Reduce unnecessary clerical work for rest of claims team.</i></p> <p>5) <i>Minimize loss adjustment and legal expenses when possible.</i></p> <p>6) <i>Maintain organized and current files, records and media.</i></p>
<p>OTHER SKILLS & APTITUDES</p>	<ul style="list-style-type: none"> • At a minimum, must possess a high school diploma or GED, with a willingness to explore insurance specific continuing education. • Excellent written and verbal communication skills: Must be clear, concise, effective and proper in all official correspondences and communications. • Ability to work independently: Must be self-directed and motivated to execute duties with minimal direct supervision. • Ability to work in a team environment: Develops constructive and cooperative working relationships with co-workers, claimants, agency partners and other insurance industry professionals. • Detail Oriented and Organized: Must be process minded, accurate and meticulous in administration, retention and maintenance of case information and related documents and files. • Technological Skills: Able to master and leverage applied use of enterprise management systems, communications software, office equipment and computing applications necessary for performing job functions. • Stress Tolerant: Has an aptitude for working calmly and maintaining core values within an environment where tight deadlines, multi-task work demands, contentious interactions, heightened senses of urgency and erratic workloads are common.
<p>NECESSARY ATTITUDES AND PERSONAL QUALITIES</p>	<ul style="list-style-type: none"> • Core Values Alignment: Must embody the Mennonite Mutual Core Values (See Critical Success Factors for specifics). • Character: High moral and ethical integrity, placing the success of the company above personal priorities and objectives. • Flexible: must be willing and able to travel, work inside the office and in the field, and adjust work schedule as required by circumstance. • Thick-skin: Judgment and productivity should not be negatively influenced by unpleasant interactions, criticisms and accusations typical of the claims process.
<p>PHYSICAL REQUIREMENTS</p>	<p>The physical and mental requirements 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.</p> <p>Work can be both sedentary and active in nature.</p> <p>Performing office work, a member of the claims department will sit or stand comfortably while performing the work, with some walking, standing, bending and carrying of light items such as papers, books, and files. In the field, walking, standing and climbing are often required, sometimes during adverse weather conditions.</p> <p>Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and speaking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.</p>



WORKING CONDITIONS	<p>The working conditions are representative of those an employee encounters while performing the essential functions of this job.</p> <p>The Claims Assistant's duties may be performed at the headquarters in a traditional office environment full-time or a hybrid schedule of part-time at headquarters and part-time at one's home office. Some claims operations may require presence at incident/accident sites, and/or inspection sites where conditions may be variable and unpredictable. Still other duties may be carried out in offices or facilities of policyholders, agencies, legal offices, courtrooms, etc. Reasonable accommodations may be made to enable individuals with disabilities to work within these conditions.</p>
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Acceptance of Claims Assistant Role Description

I acknowledge that I have reviewed and understand the requirements and expectations of this Mennonite Mutual Insurance Company role as laid out in this version of the role description. I understand that my performance of this role will be evaluated by my supervisor based my ability to appropriately fulfill these expectations.

Current Revision Date: **(Today's Date)**

Employee Signature

Date

Printed Name of Employee

Supervisor Signature

Date