

## The ASA Group

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### Job Title: New Business Associate

#### Job brief

Established insurance brokerage firm seeking an entry-level administrative assistant to become part of our New Business team. The basic functions of the New Business Associate is to serve a supporting role for the Case Managers.

#### Responsibilities

- Help gather client data to support Case Managers during the underwriting process.
- Efficiently utilize a computer for data entry, medical records retrieval, searching internet for physician contact information, and all other tasks associated with release of information.
- Notify Case Managers of any challenges or special requests from medical records facilities.
- Successfully manage fluctuating daily work volumes.
- Must be able to multi-task consistently.
- Order needed medical requirements as requested by the case manager
- Handle policy owner service processing for inforce cases
- Promptly report any customer service concerns and/or any potential HIPAA violations, whether actual or perceived, to the Director of New Business.
- May be required to fill in wherever necessary including covering the front desk to allow other team members to take lunch breaks or PTO.

#### Requirements

- Is a team player with a passion for providing excellent customer service. Must have the ability to create and maintain strong and effective client/business relationships.
- Strong verbal and written communication skills, displaying a high level of professionalism. Effective interpersonal and analytical abilities are required.
- Pro-active thinker with the ability to manage multiple priorities and a fluctuating personal work load.
- Exceptional organizational skills with a strong attention to detail in a highly regulated industry.
- Computer literacy and the ability to use a multiline phone system, copier, fax machine and other standard office equipment.
- Dependability and good attendance are key. Displays a sturdy work ethic and ability to complete tasks with a sense of urgency.
- Ability to understand and become knowledgeable of release of information standards, policies & procedures and HIPAA regulations and to complete work in compliance of these standards.
- Administrative experience in an office setting; previous release of information, medical records, or other related experience in a healthcare environment is preferred.
- Previous experience working within the insurance industry (Life, Annuity, Disability, or LTC) as a support person for case managers is preferred.

