

NORTEC JOB SPECIFIC SKILLS COMPETENCY

INSURANCE CLERK (Clerical)

DOT: 219.387-014 SVP 4

Job Description: Compiles records of insurance policies covering risks to property and equipment of industrial organization.

Physical Demands - Sedentary w/light lifting, carrying, or moving (up to 20 lbs); General Educational Development - R4 M3 L3;

Aptitudes - Average General Learning Ability, Verbal, Numerical and Clerical Perception.

CORE SKILL COMPETENCIES/INDICATORS:

1. Can demonstrate ability to accurately check information provided by agents and clients on insurance forms. (IN, S)
2. Can demonstrate ability to compile, tabulate, and analyze statistical, and other insurance data, for reports to insurance company and departments in organization. (IN, S)
3. Can demonstrate familiarity with, and can accurately type amortization schedules. (R, IN, S)
4. Can demonstrate proper procedure used to process insurance claims, new policies, and modifications to existing policies. (R, IN, S)
5. Can demonstrate proper procedure for preparing and mailing correspondence notices regarding changes. (IN, S)
6. Can demonstrate proper procedure used to file records of insurance transactions. (IN, S)
7. Can demonstrate ability to properly maintain calendar of premiums due and expiration dates of policies. (IN, S)
8. Can demonstrate proper procedure used to prepare vouchers for payment of premiums and to verify that payments have been made. (IN, S)
9. Can demonstrate proper procedure used to fill in data on renewal policy applications and forward to insurance company. (IN, S)
10. Can demonstrate ability to effectively communicate to insurance company changes in property or equipment affecting insurance coverage. (IN, I, S)
11. Can demonstrate ability to work with details using rate book. (IN, S)
12. Can demonstrate ability to transmit and receive messages using a single and/or multi-line telephone system, and make appointments, as needed. (R, IN, I, S, T)
13. Can demonstrate ability to operate standard office equipment, such as fax, shredder, envelope sealer, letter opener, collator, folder, postage meter, adding machine, etc. (R, S, T)
14. Can demonstrate ability to operate a photocopy machine; change paper, make minor adjustments, frame text, etc. (R, S, T)
15. Can operate a personal computer and standard software package. (IN, S, T) *Note: Identify software package.*
16. Can type at least 45 word per minutes with 90% accuracy. (IN, T) *Note: Additional documentation is required to verify competency for this indicator.*
17. Can demonstrate ability to appropriately sort material, documents, letters, reports, etc., for filing. (IN, S)
18. Can demonstrate ability to accurately file material, documents, letters, reports, etc. according to the agency's filing system. (IN, S)
19. Can demonstrate ability to maintain computer files. (IN, S, T)
20. Can demonstrate ability to write/type accurate and concise reports, as needed. (IN, S)
21. Can demonstrate ability to assist with bookkeeping duties, as needed. (IN, S)
22. Can demonstrate ability to deal with people beyond giving and receiving instructions. (I)
23. Can demonstrate ability to work under stress to meet schedule deadlines. (R, I)