

Oklahoma Farm Bureau & Affiliated Companies Job Description

Job Title: Policy Services Representative		Department: Policy Services	
Accountable to: Policy Service Supervisor		Issued:	Revised: 8/2024
Grade Level: 8	Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Intern <input type="checkbox"/> Seasonal	FLSA: <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Nonexempt	Position Details: <input checked="" type="checkbox"/> Individual Contributor <input type="checkbox"/> Supervisor/Manager (direct reports)

Summary Provide support to the Policy Service Department by entering various updated and /or corrected policy records into the InsuranceNow computer system.

Essential Duties and Responsibilities

1. Assist with InsuranceNow daily system tasks list when needed.
2. Assist with InsuranceNow Credit Balance Report when needed.
3. Process agent of record updates on policies.
4. Process lender name and/or address updates on policies.
5. Learn the Deposit Desk procedures such as verifying policy payments for accuracy, entering and depositing policy payments and preparing deposit documents for the Accounting Dept.
6. Learn the 4H-FFA program processes and procedures.

Other duties may be assigned.

Competencies

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

Technical Skills - Strives to continuously build knowledge and skills; Shares expertise with others.

Customer Service - Manages difficult or emotional customer situations; Responds promptly to customer needs; Responds to requests for service and assistance; Meets commitments.

Interpersonal Skills - Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control.

Oral Communication - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Demonstrates group presentation skills.

Written Communication - Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Able to read and interpret written information.

Diversity - Shows respect and sensitivity for cultural differences; Promotes a harassment-free environment.

Ethics - Treats people with respect; Works with integrity and ethics; Upholds organizational values.

Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time.

Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment.

Planning/Organizing - Prioritizes and plans work activities; Uses time efficiently.

Professionalism - Tactfully approaches others; Reacts well under pressure; Accepts responsibility for own actions.

Quality - Demonstrates accuracy and thoroughness.

Quantity - Meets or exceeds productivity standards; Completes work in timely manner; Strives to increase productivity; Works quickly.

Adaptability - Adapts to changes in the work environment; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time.

Dependability - Follows instructions and responds to management direction.

Qualifications 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

A high school diploma or general education degree (GED) is required. A minimum of two years of call center operator experience is preferred.

Language Skills

Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.

Mathematical Skills

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

Reasoning Ability

Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

Computer Skills

To perform this job successfully, an individual should have knowledge of computers and computer systems. Working knowledge of the SurePower 2000 System is helpful.

Certificates, Licenses, Registrations

Property and Casualty license is preferred.

Other Skills and Abilities

Data entry and the ability to handle telephones independently is required. Excellent customer service skills and proven problem-solving skills are necessary.

Other Qualifications

Worker must display quality of work that meets or exceeds proofing standards.

Worker is expected to maintain regular attendance.

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 sit; use hands to finger, handle, or feel and talk or hear. The employee is frequently required to stand and walk. The employee is occasionally required to reach with hands and arms and stoop, kneel, crouch, or crawl.

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 worker is regularly in a typical office environment and is not exposed to adverse environmental conditions. The noise level in the work environment is usually moderate.

We are an equal opportunity employer

Oklahoma Farm Bureau & Affiliated Companies does not discriminate on the basis of race, color, religion, national origin, sex, age or disability. It is our intention that all qualified applicants are given equal opportunity and that selection decisions be based on job-related factors.