The County Group
Insurance & Financial Solutions

Job Title: Administration Assistant

Main purpose:

Reporting to the Administration Supervisor/Branch Manager, the main purpose of the role is to administer client files compliantly and in accordance with company process.

Main responsibilities/tasks:

The job holder must be competent to complete the following tasks:

- Dealing with daily post from clients, processing the documents and update any corrections on the system, ensuring all evidence is loaded electronically and/or action with an email to the relevant insurance company.
- Update and load accidents and convictions from notifications by clients and/or insurers.
- Liaise with insurance companies to resolve document/policy queries.
- Ensure extra vigilance when processing policy documents, ensuring all cover details are correct, inputting policy numbers and forward onto the client via post or email.
- Dealing with daily emails from clients; responding to document processing, dealing with their requests and ensuring all communications and requested are documented on the system.
- Answering telephone queries from clients and colleagues, actioning any requests or issues and liaise with other departments/branches if it cannot be resolved within the administration team.
- Answer incoming calls from both clients and insurance companies, resolving any issues.
- Request proof of no claims bonus for policies that have lapsed or been cancelled, check they are correct and establish whether proof is to be issued to the client or new insurance company.
- Request annual insurance certificates from insurers, providing the policy documentation and payments have been adhered to and forward onto the client by post/email.
- Process client chaser letters to advise what documents the client has outstanding, record all evidence in the policy diary and re-diary for future checks.
- Process tasks from the policy dairy or chaser trail.
- Complete the franking of the post.
- Process and issue continuation cover notes.
- Dealing with minor finance queries such as change in payment dates.
- Processing of default letters, as well as processing and chasing client letters for outstanding money.
- Awareness of compliant handling – Being able to resolve minor customer complaints and being fully aware of the company complaints process.
- To ensure accuracy, efficiency and professionalism when dealing with internal and external clients, including both colleagues and insurers.
- Liaise with Administration Supervisor/Branch Manager regularly to ensure consistent processes are being followed and adhered to.

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Person Specification:

Level of skills and knowledge required	**Essential Criteria**	**Desirable Criteria**
Previous Experience	Have experience of working within an administration department.	Have insurance administration experience.
Skills and Knowledge	Knowledge of client management systems.	Knowledge of client management systems including insurer quote engines. Knowledge of industry rules and regulations.
Personal Qualities	Excellent time management skills and ability to multi-task and prioritise work. Attention to detail and problem solving skills. Excellent written and verbal communication skills. Committed and flexible to business needs.	
Educational Qualifications	GCSE or equivalent in Math's and English.	
Insurance Qualifications	None required.	Cert CII.
IT & Computer Skills	IT Literate and be adept in use of MS Office XP, particularly Excel and Word. Must be able to utilise the internet and office email facilities.	
Regulatory Requirements	The job-holder must have full knowledge of regulatory requirements pertaining to the role, including in particular, but not limited to disclosure requirements, rules relating to money handling, complaints processes, record keeping requirements and principles for conduct of business and FCA threshold conditions.	

This job description is not exhaustive and is subject to review in the light of changing needs of the organisation. Any review of this job description will be undertaken in consultation with the post holder.

Post Holder's name:

Post Holder's signature: **Date:**

Manager's name:

Manager's signature: **Date:**