Job Description

UNDERWRITING COORDINATOR
Job Grade (10)

General Summary
The Underwriting Coordinator is an experienced associate with proven skills in coordinating new business proposals, implementation, contracts and benefit schedules. The primary responsibility of this position is to support sales and underwriting activities of MBS by preparing new business proposals, Underwriting Schedules of Benefits and coordinating underwriting forms and contracts. This position reports directly to the Underwriting Manager.

Principal Duties and Responsibilities
- Prepare Proposals:
  - Review proposal requests for completeness and request needed information
  - Prepare underwriting packages using MBS Proposal Template
  - Request stop-loss insurance proposals and prepare comparative market studies
- Schedules of Benefits (SOB):
  - Create accurate schedules to be used during the underwriting process
  - Review SPD/PD Amendments for accuracy
  - Audit other departments’ schedules as necessary
  - Distribute Amendments, updated schedules/SPDs/PDs to appropriate persons
- Coordinate Underwriting Forms:
  - Prepare applications and request binder premium
  - Review policies for accuracy / completeness
  - Generate Acknowledgement & Sold Sheets from Marketing Database
  - Assure that most recent versions of each form are posted to the shared folder
  - Communicate updates to MBS personnel
  - Coordinate client signature process with Account Managers
  - Review all underwriting forms for accuracy prior to being released
- Reporting
  - Peer review underwriting exhibits for accuracy and completeness
  - Maintain databases and use as source for needed reports
- Set-up and maintain client files (hard copy and electronic)
- Assist underwriting associates and other MBS departments as needed

Knowledge / Skills / Abilities
- Ability to function independently and as a team player with minimal supervision
- Ability to practice discretion when dealing with confidential and sensitive information
- Ability to organize, prioritize and multi task
- Ability to proofread and review work of others
- Ability to take directions from others and adapt to fast paced environment
- Ability to analyze claims reports of various carriers / TPAs
- Intermediate knowledge of Microsoft Office (Word, Excel, Access & Outlook)
- Strong attention to detail and commitment to accuracy
- Knowledgeable of Third Party Administration concepts and philosophies
- Knowledge of ACA and impact on self-funded health plans
- Proven interpersonal and communications skills (written and oral)

Credentials and Experience
- High school diploma with applicable work experience
- NC Life & Health Insurance License
- Minimum 2 years of group health insurance marketing, preferably in a TPA environment

Access to Protected Health Information (PHI)
This position requires the employee to handle PHI for duties related to underwriting. Access to PHI includes the MBS claim system (security level 80), Medical Management files (pre-cert notices and case management narratives), eligibility files and any other source necessary to complete comprehensive and accurate renewal disclosure statements. This position is responsible and accountable for maintaining the confidentiality; integrity and availability of protected health information.