Trindel Insurance Fund

Property and Liability Claims Manager

Position Description

FLSA Status: Exempt/At-Will _X___ Non-Exempt ____

DEFINITION

The Property and Liability Claims Manager, under supervision of the Trindel Insurance Fund Executive Director, is responsible for the application of the general principles of public liability including risk funding, indemnification and underwriting, risk transfer, negotiation techniques; risk management program development and evaluation. As well as liability claims processing, federal and state legal and administrative requirements and handling first party property claims.

The Liability Claims Manager accomplishes this by analyzing loss trends, effective management of the claim cycle, setting/managing program reserves, conducting investigations, site visits, and active claim management. This includes prompt processing of claims for payment, litigation management, excess carrier notification, managing Self-Insured Retention levels and effective use of claims management software. A critical job function is the effective referral and management of claims for litigation to minimize expenses when possible while providing effective claims management strategies and outcomes.

DIMENTIONS

The Liability Claims Manager works closely with Trindel's Executive Director, department heads, external auditors, and with Trindel member counties to provide effective claims management, loss prevention, risk management and related programs to meet client needs. Must be familiar with legal, regulatory and statutory requirements for JPA self-insured programs.

Number of employees supervised: 0

ORGANIZATION FIT

This position reports to Trindel's Executive Director. The incumbent works in support of Trindel's mission and the goals and objectives of the Fund to provide extraordinary customer service and support to internal and external customers.

JOB SETTING

This position is located in a professional office environment that provides comprehensive Insurance and Risk management services for counties belonging to Trindel Insurance Fund, a joint powers authority. Trindel's administrative office is located in Weaverville, California, with a service area throughout northern and central California and eastern Sierra locations of the state.

ESSENTIAL DUTIES (*Essential functions, as defined under the Americans with Disabilities Act, may include any of the following tasks, knowledge, skills and other characteristics. The list that follows is not intended as a comprehensive list; it is intended to provide a representative summary of the major duties and responsibilities. Incumbent(s) may not be required to perform all duties listed, and may be required to perform additional, position-specific tasks.*):

- Analyze liability and first party property claims in accordance with relevant laws, County policies and procedures.
- Evaluate claims for timeliness, accuracy, validity, circumstances, descriptions and related information for accurate claims processing, accruals and referral.
- Reviews, investigates, analyzes financial data and processes financial information on a regular and on-going basis in accordance with current laws and regulations.
- Using a degree of independent judgment, determines the best methods to actively manage claims in a timely and cost effective method.
- Researches and recommends cost saving strategies through professional networks, research and on-going training and education.
- Authorizes and assures the prompt processing of checks for payment/settlement of claims.
- Provides Trindel Executive Director and member counties with monthly payment log/reports.
- Recommends settlement/resolution for obtaining settlement authority under the provisions as provided by each member county.
- Review all claims received from members to determine coverage and a course of action shall be suggested to the member.
    - Acknowledge receipt of the claim, from the member, within one (1) working day and within seven (7) calendar days shall notify the member of the suggested course of action on the claim.
- Upon receipt of a claim (within one business day) the adjuster will attempt to contact the known claimants as part of the initial investigation.
    - Within two business days of receipt, all claims will be created, reserved and opened in the claims information system.
- Coordinates and prepares information for external auditors, Trindel Board meetings, member counties and regulators as needed.
- Provides timely reports, updates and other statements information as needed to excess carriers, other insurers and agencies as necessary.
- Regularly handles private and proprietary information while maintaining strict confidentiality and protecting information from unauthorized disclosure.
- Respond in a timely manner to requests from member counties, claimants, attorneys or others for assistance by phone, e-mail, mail or site-visits.
- Assures that Trindel policies and procedures are consistently followed.
- Attend Trindel Board meetings, provide program updates as requested.
- Actively pursue subrogation after consulting with and concurrence from member.
- Shall submit and track reimbursement from excess insurance.
- Perform other duties as assigned by the Executive Director.

MINIMUM QUALIFICATIONS - Abilities required for the essential duties:

- Demonstrated claims management knowledge and experience
- Excellent, demonstrable interpersonal and organizational communication skills
- Demonstrated ethical conduct and the ability to maintain confidentiality
- Excellent writing skills, writes well, clearly and concisely
- Business Acumen, strategic thinking/planning

Skills required for the essential duties:

- Knowledge of self-insured program regulations
- Ability to work with complex and confidential information
- Effective analytical, problem solving and interpretive skills
- Strong organizational & interpersonal skills
- Ability to work in a team environment
- Ability to work independently
- Excellent oral and written communication skills
- Strong customer service orientation
- PC literate, including Microsoft Office (Word, Excel) and claims management software

Interpersonal Skills Required:

- Maintain and build effective professional relationships with Trindel co-workers as well as with similarly situated professionals and key contacts outside of Trindel.
- Does not tolerate discrimination based on race, gender, religion, ethnic background, national origin or other identified characteristics. Treats others with respect at all times.
- Effective and productive communications skills; speaks well, communicates ideas clearly. Is approachable and open to discussion.
- Conducts self in a professional manner at all times.
- Shares knowledge with others and participates in mentoring.
- Manages multiple priorities professionally with minimum disruption to others.
- Responds to unexpected challenges successfully without losing track of daily responsibilities proactively manages work environment. Prioritizes workload in order of importance. Reliably follows through with job assignments.
- Learns, applies and retains new methods and information. Creative in solving problems. Exhibits a “can do” attitude with a positive approach to challenges. Views obstacles as opportunities to learn and grow.

Education & Experience required for the essential duties:

- Four-year degree at an accredited college or university in Accounting, Business and/or Finance is preferred.
  - Three (3) to five (5) years of claims management required, experience working with public entities preferred

Desired: Hold or attain Associate in Risk Management (ARM) and Associate in Claims (liability focus) designation(s)

Position Description
Physical and Mental Analysis

Position: Property and Liability Claims Manager Department: Property and Liability Program

When considering time spent during an 8 hour workday:

***Occasionally* equals 1% to 33%; *frequently* equals 34% to 66%; *continuously* equals 67% to 100%.**

Please note some functions are performed monthly or annually can be considered essential.

Use N/A if the skill/effort does not apply.

Physical Effort	**Occasionally**	**Frequently**	**Continuously**
Stationary Position			X
Sitting/Standing			X
Move/Traverse Walk/Crawl/Stoop/ Kneel/Crouch/Run	X		
Ascend/Descend	X		
Climb: Steps/Stairs/Ladders/ Inclines/Ramps	X		
Reach Overhead	X		
Crouching	X		
Balancing	X		
Pushing or Pulling	X		
Communicate: converse with, convey, express self, exchange information			X
Use hands/fingers: operate, activate, use, place, position, inspect, grasp			X
Lift: move, transport, position, place			
10lbs or less		X	
11 to 25 lbs	X		
26 to 50 lbs	X		
51 to 75 lbs	N/A	N/A	N/A
76 to 100 lbs	N/A	N/A	N/A
Over 100 lbs	N/A	N/A	N/A
Carry			
10lbs or less		X	
11 to 25 lbs		X	
26 to 50 lbs	N/A	N/A	N/A
51 to 75 lbs	N/A	N/A	N/A
76 to 100 lbs	N/A	N/A	N/A
Over 100 lbs	N/A	N/A	N/A
Eye/Hand Coordination			X
Depth Perception	X		

Position Description
Physical and Mental Analysis

Mental Effort	Occasionally	Frequently	Continuously
Thinking Analytically			X
Communication: Use effective communication skills (written, verbal, etc.)			X
Handle stress/emotions		X	
Concentrate on tasks			X
Maintain mental focus			X
Recall names/details			X
Decision making		X	
Adjust to changes			X
Examining/Observing details			X
Discriminating colors	X		

Performance	Occasionally	Frequently	Continuously
Attendance			X
Work assigned hours			X
Regular hours			X
Evening/Weekends	N/A	N/A	N/A
On Call	X	N/A	N/A
Attend Work Meetings		X	
Direct others	X		
Cooperate with Others			X
Work in a Team Environment			X
Handle Confidential Information			X
Work with the Public		X	
Computer Use			X
Phone Use			X
Meet deadlines			X
Keep organized workspace			X
Perform math calculations			X
Operate Office Equipment		X	
Operate Motor Vehicle	X		

Notes: Work indoors in a professional office setting, occasional travel is required. This position requires the individual to be dedicated to providing a very high level of accuracy and customer service. Must have a positive mental outlook and "can do" attitude. Performs all work in a safe and efficient manner at all times and follows safety rules, policies and practices on a continual and on-going basis. Must hold a valid California driver's license.

Completed by: Randy Robertson
Date: December 2015

Reviewed by: _____
Date: _____