Processor

Job Profile

Reporting to: Director of ICT & Compliance
Department: Processing

Job Purpose

As a member of the Processing Team, the Processor is responsible for accurate data entry, transaction processing, verification of data and policy documentation, compliance adherence, and reporting. This role is accountable for performing assigned duties in accordance with documented procedures, service standards, and regulatory requirements.

The Processor collaborates closely with internal team members and Insurer Partner support teams, serving as a key point of coordination to ensure accurate processing, clear communication, and high-quality service delivery. The role provides a foundation for growth within the organization and may serve as a pipeline for more advanced positions, offering opportunities to develop skills, gain experience, and expand responsibilities over time.

You will uphold the organization's *Commitment to Excellence* by performing your duties with integrity, accountability, and attention to detail. This role reflects excellence in operational execution, communication, and compliance stewardship, aligned with the brokerage's core values of **Professional, Committed, Innovative, and Proactive**.

Key Duties & Responsibilities

1. Processing

- Record, update, and maintain accurate information across internal and external systems
- Post transactions to client accounts and generate invoices
- Generate, review, and reconcile reports as required
- Review and manage documentation and correspondence related to policies and transactions

2. Compliance

- Follow detailed workflows and standard operating procedures accurately and without unauthorized deviation
- Ensure adherence to legal, regulatory, internal, and insurer requirements and standards

- Identify, report, and escalate issues or concerns promptly to the appropriate contact
- Operate within established KPI metrics, service standards, and performance expectations
- Assist with internal and external audits by compiling requested information, maintaining accurate records, and responding promptly to audit inquiries

3. Collaboration & Continuous Improvement

- Foster a positive, cooperative work environment that emphasizes accountability, efficiency, and excellence
- Communicate professionally and effectively with team members, insurer partners, and management
- Consistently demonstrate and uphold organizational core values
- Identify opportunities for workflow improvements and increased efficiency, and proactively share recommendations through appropriate channels for review and approval

4. Additional Responsibilities / Special Projects

- May be assigned special projects or tasks outside of core duties.
- Participation is encouraged and recognized, and may contribute to performance bonuses or other recognition programs
- Projects will align with organizational goals and may include process improvements, system enhancements, or other initiatives
- Participation in these projects may also provide opportunities to develop skills and prepare for more advanced roles within the organization

The duties and responsibilities outlined in this document are representative of the role and may be adjusted to meet operational, regulatory, or business needs.

Qualifications

Education

- Post-secondary education, or equivalent experience, is preferred
- Commitment to ongoing professional development and continued learning to maintain and expand relevant skills

Professional Credentials

- Level 1 General Insurance License is considered an asset but is not required

Knowledge, Skills & Abilities

- Excellent verbal and written communication skills, including the ability to raise concerns, ask questions, and suggest changes constructively

- Strong attention to detail with the ability to follow complex workflows and established procedures accurately
- Exceptional organizational, time management, and work prioritization skills, with the ability to balance competing tasks and meet deadlines efficiently
- Professional, courteous, and respectful demeanor
- Strong analytical and problem-solving capabilities
- Strong technical aptitude with the ability to quickly learn and effectively use required systems, tools, and technologies

Experience

- Previous data entry or processing experience is preferred
- Experience with insurance company portals is an asset
- Experience with Applied Epic is an asset

Success Profile

Professional

Demonstrates integrity, accountability, sound judgment, and strong privacy awareness.

Committed

Maintains clear communication, supports team success, and contributes positively to operational effectiveness.

Innovative

Identifies opportunities for system enhancements, automation, process improvement, or other special initiatives beyond core responsibilities.

Proactive

Maintains awareness during daily work, recognizes potential issues even outside their immediate responsibilities, takes timely and appropriate action or escalation, and actively supports continuous improvement initiatives.