

## **The Mahoney Group**

### **Direct Bill Accounting Assistant**

**Job Title:** Direct Bill Accounting Assistant  
**Department:** Accounting  
**Reports To:** CFO  
**Location:** Mesa, AZ  
**FLSA Status:** Non-Exempt

**Summary:** This position will be an Intern-Direct Bill Accountant role with the largest independent insurance agency in Arizona and will be performing duties which require a very hands-on and detail-oriented focus in performing daily reconciliation of Benefits-Direct Bill Statements. High School degree required with one who is currently pursuing a college degree in accounting or finance. Accurate / Efficient data entry abilities a plus.

**Essential Duties and Responsibilities** include the following. Other duties may be assigned.

1. Reconcile Benefits-Direct Bill Statements. Verify accuracy of billing data and revise errors. Ensure the accuracy of the following: Statements are accurately billed to the customers, collections are properly reconciled, checks are properly applied against the billing statements, and applicable commissions and portion due to the Insurance Carriers are properly recorded.
2. Working with and effectively communicating with Customer Service Agents within the company to make sure billing issues are resolved and Producers are appropriately compensated on their respective accounts.
3. Contact Insurance Carriers when appropriate in resolving reconciling billing related issues and obtain or relay account information.
4. Assist in projects directed by Direct Bill Staff Accountant.
5. Operate typing, adding, calculating, and billing machines.
6. Prepare itemized statements, bills, or invoices; and record amounts due for items purchased or services rendered.
7. Keep records or invoices and support documents.
8. Resolve discrepancies in accounting records.
9. Various office duties as assigned or directed.

### **Supervisory Responsibilities**

This job has no supervisory responsibilities

### **Competencies**

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

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully.

Customer Service - Respond promptly to customer needs; Respond to requests for service and assistance; Meet commitments.

Written Communication - Write clearly and informatively; Present numerical data effectively; Able to read and interpret written information.

Teamwork - Balance team and individual responsibilities; Contribute to building a positive team spirit; Support everyone's efforts to succeed.

Quality Management - Look for ways to improve and promote quality; Demonstrate accuracy and thoroughness.

Organizational Support - Follow policies and procedures; Complete administrative tasks correctly and on time; Support organization's goals and values.

Planning/Organizing - Use time efficiently; Set goals and objectives.

Quality - Demonstrate accuracy and thoroughness.

Quantity - Meet productivity standards; Complete work in timely manner.

Dependability - Follow instructions, respond 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**

High School Degree required. Candidate is expected to be currently pursuing a college degree in accounting or finance. Insurance industry knowledge and accounting experience a plus.

### **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 calculate figures and amounts such as discounts, interest, commissions, proportions, and percentages.

### **Reasoning Ability**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

### **Computer Skills**

To perform this job successfully, an individual should have knowledge of Microsoft Access, Microsoft Excel and Microsoft Word software, TAM, Paper Wise.

**Other Skills and Abilities**

Experience in applied The Agency Manager or other similar system for accounting file maintenance a plus.

10 Key proficiency

**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 talk or hear. The employee is frequently required to sit and use hands to finger, handle, or feel. The employee is occasionally required to stand; walk and reach with hands and arms. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision.

**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. While performing the duties of this job, the employee is occasionally exposed to moving mechanical parts. The noise level in the work environment is usually moderate. Travel is minimal; contact with customers in person, by phone and correspondence.

**The Mahoney Group is an EEO employer.**