

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: <u>18 May 2020</u>	Manager name: <u>Hoang Kim Hung</u>
	Manager title and GCF level: <u>Associate Director, Claims / 6.2</u>
Job title: <u>Manager, Claim Investigation</u>	Department: <u>New Business, Underwriting and Claims / Claims</u>
Job level: <u>6.1</u>	BU/Division: <u>Sun Life Vietnam / Client Services</u>

Job purpose

Please provide a summary of the purpose and objective of the job.

This role is designed to monitor all investigation activities of the Requesting Division in order to operate smoothly daily in providing verification directions. Analyze the excellent and effective investigation plan, to help assess complaints quickly and accurately for customers and adhere to company strategies to ensure credibility.

Be able to provide the response to inquiries and complaints related to claims from claimants, advisors, other departments that are relevant to the investigation.

Major accountabilities

Identify 5-6 major accountabilities of the job (not the employee). Describe these accountabilities by what is to be accomplished, how and why. Use action verbs to begin each sentence. Avoid the use of acronyms. Include the approximate percentage of time spent on each accountability. The percentages below should sum up to 100.

Accountabilities	%
<ul style="list-style-type: none"> ▪ Proposing, initiating and managing operations of nationwide Investigate team to ensure Claims team's activities smoothly executed in accordance with the Company principle and guidelines; monitoring quality and productivity of investigator staff to ensure fast and accurate assessment as Claims guidelines and cost efficiency ▪ Reviews internal manuals and may develop recommendations on management strategies. Develops, documents and executes claims management plans by identifying trends in cases. ▪ Appraises and approves benefit claims within prescribed approval limits ▪ Well managed and well planned for the travel costs of the investigations of the whole team 	25
<ul style="list-style-type: none"> ▪ Control and manage the Investigate Team for doing investigate in the claim cases need investigation. Always finding the most effective verification methods but must follow the law. ▪ Create strategies and methodologies for identification of fraud indicators. 	20
<ul style="list-style-type: none"> ▪ Manages litigated claims and appeals, instructs counsel on disposition. Acts as a technical resource and coaches investigators on complex claims decisions. ▪ Guide and train a team investigators of composed of many members 	20
<ul style="list-style-type: none"> ▪ Skilled and proactive working across functions such as Compliance, Legal, Complaint handling, Medical team, Underwriting, outsides: ▪ Co-operate with Legal department for seeking advice for complex cases that could lead to litigation. Co-operate with Compliance department for the fraud cases or suspected cases. Co-operate with Complaint handling department to handle complaints and respond enquiries that related to claims from clients, advisor, other departments. Co-operate Medical team for the case has medical aspects during investigation. ▪ Help feedback to Underwriting and Sales teams on patterns of claim frauds and investigation results, and help improve the field underwriting and NB Underwriting processes ▪ Build relationships across industries and industry bodies, to help in the investigation process 	20

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<ul style="list-style-type: none"> ▪ Continuous improvisation of processes to shorten TAT, and improve claim experience ▪ Think of ways to bring technology (Speedy rules, Data Analytics and AI) to help detect frauds. 	10
<ul style="list-style-type: none"> ▪ Coordinate, support colleagues in all operations ▪ Other tasks assigned by manager and leader. 	5

Specialized knowledge

List specific types of technical or professional skills and knowledge required for the job.

<ul style="list-style-type: none"> - Communication skills to interact with dynamic personalities to obtain information - Logical thinking to make the right judgement to support or deny a claimant's case - The ability to handle multiple tasks at one time. - Work in an organized manner. - Ability and willingness to learn and adapt to the working environment and to do whatever it take to close a case - Proficient in Microsoft Office (Word, Excel, Access, PowerPoint)

Problem solving

Outline problem solving requirements in terms of how standardized, varied, complex and interdependent problems and issues are typically faced by this job. Provide examples if necessary.

<ul style="list-style-type: none"> - Create strategies and methodologies for identification of fraud indicators - Build strong investigation team, make instruction clearly, manage investigation budget - Skilled and proactive working across functions such as Compliance, Legal, Complaint handling, Medical team...

Education and experience

Indicate the minimum education level and years of relevant experience required to perform the work. Include specific professional designations, licenses, registrations, if applicable.

<ul style="list-style-type: none"> - University graduated. - Knowledge of law, medical, insurance and police. - Relevant Working Experience: At least 8 years of experience in Investigate Claims field - Have good knowledge of life insurance and well skills

Communication scope

Identify the level and nature of internal and external contacts with whom this job must interact regularly. Describe the reason and frequency of their communication.

<ul style="list-style-type: none"> - Internal contact: colleague in Client services and other sections such as Legal, Compliance, IT, A&P, Finance...; advisor, sales force to handling issues related client's claim case, process, project... - External contact: to serve customer, or contact hospitals, clinics, police station, people in the field during investigation trip, or claim employee in the market...

Management scope

<p>Total number of direct reports: 6</p> <p>Total number of staff managed (direct and indirect): 6</p>
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Metrics (if applicable)

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Finance metrics (revenue, budget managed, etc.):
 Sales metrics (type and amount):
 Other metrics (specify):
 Travel required (express as % of working time): 10% - 40%

Prepared by:		Date:	
Approved by:		Date:	
For HR Use Only			
Handled by:	<i>Phan Duy Thien</i>	Date:	<i>Jun. 22, 2020</i>
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