

A background image showing a person's hands holding a yellow pencil, writing on a document. A laptop is visible in the background, suggesting a professional or educational setting.

Consumer Assistance Training Online

April 16-23 • November 12-19

If you are a consumer services representative or interested in improving the effectiveness with which you manage the complaint handling process from start to finish, this course should be an essential part of your preparation. You will learn how to process and code complaints, why proper complaint coding is essential for effective regulation, and when to communicate issues with various divisions of your insurance department to ensure that consumers receive excellent service and that uniformity in complaint handling is achieved.

At the completion of this course, you will be able to:

- List and describe the various provisions under the Unfair Claims Practices Act, the Unfair Trade Practices Act, and state mandates, and describe how they protect consumers.
- Describe potential consequences that can occur when uniformity is not maintained.
- Identify systems, practices, or processes within the consumer services area that are particularly prone to inconsistencies among states.
- Define, statutorily, the difference between a complaint, an inquiry, and a factual dispute.
- Track the general process of complaint handling from the moment a consumer submits a complaint to a Department of Insurance (DOI).
- Work collaboratively with other functional units within a DOI when responding to complaints.
- Utilize the NAIC's Standard Complaint Data Form to correctly code a complaint.
- Respond appropriately to consumer inquiries and complaints.
- Identify quality controls in place at the state level to ensure consumers are provided with a high level of service.

What past participants have said:

• *I thoroughly enjoyed this course and was able to put some of the information that I gained to use right away when responding to consumers. I appreciated the fact that I could participate while at work or at home, whatever was more convenient for me.*

• *I was pleasantly surprised. Not having taken an online course before, I wasn't sure what to expect. However, I learned a lot and will be able to use the material in future training and day-to-day work here at our agency.*



National Association of Insurance Commissioners

Consumer Assistance Training Online

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Tuition

- \$295 for State Insurance Department Staff
- \$495 for All Other Regulators

Provides comprehensive course materials, access to subject matter experts who serve as course facilitators, and the opportunity to network with others from across the country.

Certificate of Completion and Continuing Education

To receive a Certificate of Completion and the documentation that you can use when requesting continuing education credit from other organizations such as SOFE or IRES, you must successfully complete this course. If you are a Designation Candidate, you must successfully complete the course to be eligible to take the exam. The requirements for successful completion are outlined in the course syllabus sent prior to the course and posted within the class.

Within two weeks after the course has ended, the administrator will review all coursework based on the guidelines listed on the syllabus. Determination of successful completion will be sent via e-mail to those who earn this notification. Fourteen (14) credits will be listed on continuing education materials for this one-week course. Partial credit is not awarded.

Our Recommendations for Your Online Study

- Determine whether online learning is something you will benefit from by taking the short "Is Online Learning for Me" quiz at www.naiconline.org and check your technical requirements prior to enrolling.
- Plan your study time in advance.
 - Online courses offer great flexibility but also require self-motivation, commitment, good time management skills, and space in which to study. You need to be able to fit your study time into your own work schedule.
- Review your course materials and the *Handbook for Distance Learners* that will arrive the week prior to the course.
- Set learning goals for yourself based on what you hope to accomplish by taking this class.
- Familiarize yourself with information in the course syllabus.
- Spend a minimum of two hours a day on your study.

Cancellation Policy

Withdrawals for full refund are permitted up to three weeks before the beginning date of the course; cancellations after this date will result in no refund. Notification of cancellation must be received in writing. If issued, refunds will be mailed after the completion of the course. Substitutions are accepted up to one week before the course begins.

REGISTER online at <http://education.naic.org> or complete and return the registration form below. Space is limited so you are encouraged to register early. You will be contacted via e-mail with confirmation of your registration, your password, and login information.

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FAX TO:
816-460-7544

MAIL TO:
NAIC Education & Training
Post Office Box 870335
Kansas City, MO 64187-0335

REGISTER ONLINE AT:
<http://education.naic.org>

Name: _____

Title: _____

State/Organization: _____

Address (No PO Boxes): _____

City: _____ State: _____ Zip: _____

Phone: _____ E-mail: _____

- I am taking this as an NAIC Professional Designation course (State Ins Dept Staff only).
- I am applying for a Financial and Market Conduct Regulatory Education Grant (State Ins Dept Staff only. Payment must accompany registration form. See application for details.)

Tuition

- \$295 State Insurance Department Staff
- \$495 All Other Regulators

Please note that if shipping materials outside of the continental United States, additional fees will apply.

Payment Method

- Check or Money Order payable to the NAIC (Payment must accompany registration form)
- Credit Card (We will contact you by phone to obtain payment information)
- Zone Funds / Grant Funds / Scholarship (Please circle one. State Ins Dept Staff only)