

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: INSURANCE CLERK I

BASIC FUNCTION:

Audit insurance deductions data for effective, accurate, payment of employees according to established timelines; compute insurance premium payments and adjust billings based on employee leaves.

DISTINGUISHING CHARACTERISTICS:

Insurance Clerk I incumbents perform standard clerical activities in support of employee benefit, worker's compensation and other insurance programs. The Insurance Clerk II incumbents serve in a lead capacity and perform more technical and complex duties.

REPRESENTATIVE DUTIES:

- Perform insurance deduction activities for personnel and reconcile data printouts.
- Coordinate personnel actions with payroll deductions and data processing for insurance deductions.
- Compile data and prepare various reports relative to insurance benefits.
- Receive, screen and direct incoming telephone calls and walk-ins; answer questions regarding benefit coverage, costs and payroll information as necessary.
- Update and maintain employee files regarding changes in benefits and employment as necessary.
- Maintain and process various insurance billings.
- Utilize computer to add, delete, or change employee insurance information.
- Distribute insurance materials to staff and department supervisors.
- Maintain and update payroll files and records of a confidential nature with insurance emphasis, COBRA, TEFRA and leaves of absences.
- Process and maintain records of staff leaves and absences.
- Reconcile worker's compensation and unemployment benefits with insurance benefits and leaves.
- Notify and assist employees regarding medical coverage.
- Prepare various correspondence, forms, reports and other materials as needed.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Techniques involved in insurance payroll preparation monitoring and control.
- Insurance deductions.
- Modern office practices, procedures and equipment.
- Preparation, review and control of assigned accounts.
- Preparation and processing of insurance information.
- District insurance and payroll policies and procedures.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Prepare, verify, process and control an assigned payroll.
- Work cooperatively with others.
- Add, subtract, multiply and divide quickly and accurately.
- Learn department and program objectives and goals.
- Maintain current knowledge of program rules, regulations, requirements and restrictions.
- Maintain routine records.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and one year clerical experience.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: INSURANCE CLERK II

BASIC FUNCTION:

Provide fiscal responsibility of insurance benefits through timely and accurate management of records and funds; provide operational support to assigned personnel.

DISTINGUISHING CHARACTERISTICS:

The Insurance Clerk II incumbents serve in a lead capacity and perform more technical and complex duties. Insurance Clerk I incumbents perform standard clerical activities in support of employee benefit, worker's compensation and other insurance programs.

REPRESENTATIVE DUTIES:

- Receive and verify monthly billings from a variety of insurance carriers; prepare check to pay related billings.
- Maintain records of insurance billings and payments.
- Receive, screen and direct high volume telephone calls; answer questions regarding benefit coverage and costs and insurance inquiries.
- Compute employee insurance premium amounts and enter amounts in the computer.
- Notify and collect first month insurance premiums from employees; reimburse employees upon leave of absence, termination or change of coverage.
- Inform eligible employees of benefit changes; mail necessary forms and applications to employees as necessary.
- Update and maintain employee files regarding insurance benefits and employment changes.
- Communicate with insurance companies and employees; correspond with insurance companies on behalf of employees.
- Receive, review and verify eligibility of employee insurance applications.
- Compile data and prepare various reports.
- Verify employee insurance coverage for other insurance companies and medical facilities.
- Distribute benefits materials to other departments as needed.
- Organize and instruct employees regarding insurance options during open enrollment period.
- Communicate with School Board and the State Division of Insurance to coordinate activities, exchange information and resolve questions or issues.
- Process a variety of correspondence regarding insurance and compose appropriate responses.
- Lead and train assigned staff especially during high volume periods such as open enrollments.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Techniques involved in insurance payroll preparation monitoring and control.
- Insurance deductions.
- Modern office practices, procedures and equipment.
- Preparation, review and control of assigned accounts.
- Preparation and processing of insurance information.
- District insurance and payroll policies and procedures.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Prepare, verify, process and control an assigned payroll.
- Work cooperatively with others.
- Add, subtract, multiply and divide quickly and accurately.
- Lead and train assigned staff.
- Learn department and program objectives and goals.
- Maintain current knowledge of program rules, regulations, requirements and restrictions.
- Maintain routine records.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and two years increasingly responsible clerical experience including at least one year in an insurance function.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: EMPLOYEE BENEFITS SPECIALIST

BASIC FUNCTION:

Oversee the implementation and maintenance of the employee benefits program; coordinate enrollment for employee benefits; counsel employees of benefits and options.

REPRESENTATIVE DUTIES:

- Counsel employees and employee representatives of certified and classified benefit and retirement plans.
- Supervise the distribution of employee benefits information and assist employees and applicants with processing enrollments and forms for various benefits.
- Coordinate the processing of unemployment insurance and assist with workers' compensation claims pertaining to loss of benefits.
- Analyze employee separations and terminations and prepare documentation and information for unemployment hearings; attend hearings as required.
- Organize and attend benefit workshops and seminars to maintain current knowledge of statutes, regulations, rules and District policies for coverage's pertaining to employee benefits; update benefit information for employees pertaining to employee benefits; update benefit information for employees as needed.
- Coordinate activities with Personnel Services and division and department heads in the information and completion of paper work related to employee benefits; coordinate the implementation of various benefits.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Various employee benefits plan.
- Business and accounting procedures.
- Laws, statutes, regulations, policies and procedures related to benefits.
- Record-keeping techniques.
- District organization, operations, policies and objectives.
- Interpersonal skills using tact, patience and courtesy.
- Auditing procedures related to employee benefits.
- Hearing procedures and related documents.

ABILITY TO:

- Supervise the implementation and maintenance of the employee benefits program.
- Coordinate enrollment for employee benefits.
- Assist employees and applicants with processing enrollments and forms.

ABILITY TO - continued:

- Analyze situations accurately and adopt an effective course of action.
- Read, interpret, apply and explain rules, regulations, policies and procedures.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Maintain records and prepare reports.
- Work independently with little direction.
- Meet schedules and time lines.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and three years increasingly responsible employee benefit experience.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: WORKERS' COMPENSATION SPECIALIST

BASIC FUNCTION:

Supervise the implementation of a workers' compensation program; process workers' compensation claims and monitor employee injuries; coordinate and promote injury remedial assistance; counsel injury disabled employees and appropriate administrative staff.

REPRESENTATIVE DUTIES:

- Supervise the implementation of a workers' compensation program.
- Process employee claims pertinent to workers' compensation according to established procedures; maintain program files and loss control data.
- Counsel injury disabled employees regarding the claims process.
- Evaluate employee job descriptions for physical demands and recommend to appropriate personnel the return to work status.
- Counsel employees regarding various benefits and coordinate services with benefits counselors.
- Assist in meetings and in-service training with appropriate personnel related to District-wide accident reporting procedures and laws pertaining to workers' compensation claims.
- Coordinate and promote the injured employee rehabilitation program with other personnel and agencies.
- Prepare reports to appropriate personnel regarding workers' compensation claim status of injured employees and monitor employee injuries.
- Communicate with workers' compensation service companies to exchange information, coordinate activities and resolve issues or concerns.
- Maintain current knowledge of statutes, regulations, rules and District policies related to workers' compensation and update related information for appropriate personnel.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Insurance and workers' compensation claim processing.
- Medical terminology related to claims.
- Current statutes, regulations, rules and District policies related to workers' compensation.
- Counseling techniques.
- Record-keeping techniques.

KNOWLEDGE OF CONTINUED:

- District organization, operations, policies and objectives.
- Interpersonal skills using tact, patience and courtesy.
- Technical aspects of field of specialty.

ABILITY TO:

- Supervise the implementation of a workers' compensation program.
- Process workers' compensation claims.
- Read, understand and evaluate employee job descriptions.
- Maintain, prepare and update records and information related to workers' compensation.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Work independently with little direction.
- Plan and organize work.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and three years experience in workers' compensation activities.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: ADMINISTRATIVE SECRETARY II

BASIC FUNCTION:

Perform a wide variety of specialized and responsible secretarial and administrative support duties for a Deputy Superintendent or other high-level Cabinet administrator; organize and coordinate office activities and communications to assist the Deputy Superintendent with assigned functional areas of responsibility.

DISTINGUISHING CHARACTERISTICS:

Administrative Secretary II incumbents perform specialized and responsible secretarial and administrative support duties for a Deputy Superintendent or other high-level Cabinet administrator. Administrative Secretary I incumbents perform specialized and responsible secretarial and administrative support duties for an Assistant Superintendent, Executive Director or other high-level administrator.

REPRESENTATIVE DUTIES:

- Perform a wide variety of specialized and responsible duties independently in support of functions delegated to a Deputy Superintendent or other high-level Cabinet administrator; interpret and apply rules and regulations as appropriate; perform duties to assist with administrative detail as appropriate.
- Coordinate communication between the Superintendent and District administrators, personnel, students, educational institutions, vendors, other outside organizations and the public; obtain and provide information, coordinate activities and resolve problems.
- Research, review, check, correct and compile a variety of information; verify data for accuracy, completeness and compliance with established procedures; input and retrieve computerized data in computer systems as required.
- Prepare and maintain a variety of records, logs and files including information of a confidential nature; maintain confidentiality of information and records.
- Compile information and data for a variety of reports; organize, type and print reports and other written materials related to assigned office functions.
- Respond to requests for information from students, staff and the general public regarding District programs, policies, procedures and regulations.
- Type a wide variety of materials such as correspondence, reports, contracts, forms, applications, memoranda and other documents.

REPRESENTATIVE DUTIES CONTINUED:

- Take and transcribe dictation of minutes, letters and memoranda, including materials of a confidential nature as required by the position; prepare correspondence and memoranda independently or from oral instructions.
- Operate a computer terminal and microcomputer to maintain records and generate reports, lists and other materials; utilize word processing and other software as required.
- Receive, process and route mail; order, issue and maintain department supplies, forms and equipment.
- Train and provide work direction to departmental clerical support staff as assigned; monitor office workflow and assure compliance with established time lines, procedures and standards of quality.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:**KNOWLEDGE OF:**

- Modern office practices, procedures and equipment.
- Record keeping and report writing techniques.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- District organization, operations, policies and objectives.
- Oral and written communication skills.
- Applicable sections of Kentucky Administrative Regulations and other applicable laws.
- Interpersonal skills using tact, patience and courtesy.
- Telephone techniques and etiquette.
- Operation of a computer terminal and a variety of other office equipment including typewriter, calculator, copiers and dictation equipment.

ABILITY TO:

- Perform secretarial and administrative assistance duties.
- Read, interpret, apply and explain rules, regulations, policies and procedures.
- Type at an acceptable rate of speed.
- Take and transcribe dictation at an acceptable rate of speed.
- Work independently with little direction.
- Establish and maintain effective working relationships with others.
- Meet schedules and time lines.
- Prepare reports by gathering and organizing data from a variety of sources.
- Work confidentially with discretion.
- Analyze situations accurately and adopt an effective course of action.
- Communicate effectively both orally and in writing.

ABILITY TO CONTINUED:

- Work efficiently with many interruptions.
- Operate a variety of office equipment including computer terminals, calculator, typewriter, copiers and dictation equipment.
- Make arrangements for meetings and conferences.
- Maintain a variety of files, records and logs.
- Plan and organize work.
- Provide work direction to others as assigned.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and five years of responsible secretarial experience involving the use of word processing and record-keeping software.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: SECRETARY II

BASIC FUNCTION:

Perform advanced-level secretarial duties for a Director-level administrator of a major District function requiring independent judgment and analysis; plan, organize and coordinate office activities and communications to relieve the administrator of routine administrative and clerical details.

DISTINGUISHING CHARACTERISTICS:

Secretary II incumbents report to a Director-level administrator with responsibilities for overall program administration of a large, complex District function and perform administrative assistance duties. Secretary I incumbents report to a District coordinator, specialist or other administrator having responsibility for a program of smaller size, complexity and impact and perform responsible administrative assistance duties.

REPRESENTATIVE DUTIES:

- Serve as secretary to a District-level Director or administrator of a large, complex program or function; plan, organize and coordinate activities to relieve the administrator of routine clerical details.
- Interview and screen callers and visitors, including students, teachers, administrators, parents, vendors and the public and provide information or direct to appropriate personnel; provide detailed and technical information concerning District policies, procedures and established regulations.
- Communicate with parents and District personnel on confidential or sensitive issues; screen incoming calls to gather and exchange information.
- Assure timely communications between office and District employees; make phone calls to receive and transmit information; type memos, bulletins, letters and notices; prepare Board agenda items and related materials as assigned; compose correspondence or prepare from rough draft.
- Type a variety of items including inter-office communications, requisitions, forms, letters, special projects, legal documents and other materials; establish, modify and maintain project and confidential filing systems.
- Train and provide work direction to other clerical personnel as assigned.
- Research and compile information and compute statistical data for federal, State and District reports and special projects as assigned.

REPRESENTATIVE DUTIES - continued:

- Assist in the maintenance of department budgets; enter data into computer to charge appropriate accounts; review invoices, requisitions and purchase orders for accuracy, completeness and compliance with department and District policies; inspect and verify accuracy of District financial reports with office records; research and resolve discrepancies as needed.
- Review or prepare a variety of materials and documents, including financial documents, invoices, inventory records and statistics; order supplies and materials and prepare purchase orders; assure adequate forms and supplies to support office operations.
- Attend a variety of meetings; prepare and send out notices of meetings; collect and compile information for meetings, projects and workshops; prepare and distribute minutes.
- Take and transcribe dictation of letters, reports, bulletins, meetings and memoranda as required; transcribe materials from dictation equipment as required; provide secretarial and clerical assistance to other staff as necessary.
- Maintain a variety of complex personnel records, time sheets, lists, files and records, including confidential materials.
- Compile data for budget; post and maintain budget and financial records of a variety of programs; monitor account balances and record expenditures.
- Receive, open and screen incoming mail and independently compose replies according to established procedures.
- Operate a variety of office equipment such as typewriter, computer terminal, FAX machine, copier and calculator.
- Coordinate communications between supervisor and other District staff and the public.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Applicable sections of Kentucky Administrative Regulations and other applicable laws.
- District organization, operations, policies and objectives.
- Organization, rules, regulations and programs related to an assigned office or function.
- Operation of a computer terminal and data entry techniques.
- Software applications used by the District, including word processing and spreadsheets.
- Financial and statistical record-keeping techniques.
- Basic budget monitoring and control.

KNOWLEDGE OF CONTINUED:

- Telephone techniques and etiquette.
- Financial and statistical record-keeping techniques.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Perform advanced-level secretarial duties requiring independent judgment and analysis.
- Plan, organize and coordinate office activities and communications to relieve the Director of routine administrative and clerical details.
- Work independently with little direction.
- Type at an acceptable rate of speed.
- Analyze situations accurately and adopt an effective course of action.
- Compose independently or from oral instructions letters, memos, bulletins or other material.
- Read, interpret, apply and explain rules, regulations, policies and procedures.
- Maintain records and prepare reports.
- Communicate effectively both orally and in writing.
- Meet schedules and time lines.
- Add, subtract, multiply and divide quickly and accurately.
- Establish and maintain cooperative and effective working relationships with others.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and three years of increasingly responsible secretarial and clerical experience.