



**GENERAL INFORMATION**

*TITLE*..... Benefits Specialist  
*DEPARTMENT*..... Confidential  
*LICENSURE* ..... N/A  
*ENDORSEMENT*..... N/A  
*CLASSIFICATION* ..... Confidential  
*FLSA STATUS*..... Non-Exempt  
*REPORTS TO* ..... Assistant Superintendent for Finance and Operations  
*SUPERVISORY RESPONSIBILITIES*..... N/A  
*PRIOR EXPERIENCE* ..... Three years of accounting experience in public, non-profit organizations  
*EVALUATION* ..... Evaluated by the Assistant Business Manager and/or other certified evaluators using the agreed upon evaluation tool. This includes formal observation of job performance and the inclusion of informal observation data. The evaluation cycle for the Benefits Specialist shall be one fiscal year.

**JOB GOAL**

To regularly and directly assist the Assistant Superintendent for Finance & Operations and the Assistant Business Manager in the coordination of all employee benefit functions and accounting as defined by the Board of Education’s policies and procedures and the Illinois School Code.

**MAJOR DUTIES & PERFORMANCE RESPONSIBILITIES**

The criterion indicated below are intended to describe various types of work that may be performed. The exclusion of specific responsibilities does not prohibit them if the work is similar, related, or a logical task of the position.

In coordination with the Executive Director for Human Resources the Administrative Assistant for Human Resources:

- Analyze and administer various components of employee benefits and workers’ compensation programs for the District.
- Assemble and analyze data regarding employee benefits functions and accounting, and make appropriate recommendations to the Assistant Business Manager and/or Assistant Superintendent for Finance & Operations for the purpose of maintaining compliance with laws, rules and regulations concerning employee benefits.
- Process employee health, dental and life insurance enrollment forms.
- Assist employees to resolve problems and answer questions with respect to insurance coverage, and assist employees, beneficiaries and/or insurance providers for the purpose of verifying eligibility and processing claims.
- Advise Assistant Business Manager and/or Assistant Superintendent for Finance & Operations of any difficulty with the efficiency and effectiveness of claim payments and make recommendations on the policies, practices and procedures regarding the processing of employee health, dental and life insurance claim payments.
- Oversee recordkeeping for billing of all District benefit plans and account for monthly, quarterly and annual billings for all benefit plans; reconcile these bills to payroll and work with District Payroll Coordinator to ensure employee deductions are properly calculated and counted.
- Review each payroll, including deductions for withholding tax, pension, social security, medical insurance, dental insurance, life insurance and other salary deductions authorized by the Board of Education.
- Administer and maintain accounting records for District’s cafeteria plan. Make necessary announcements and communications to ensure that participants electing the plan are adequately trained.
- Perform all necessary action to complete accident and injury report files and maintain and file workers compensation claim forms.
- Monitor 403 (b) and 457 plans and work with third party vendors to ensure that accounts are properly credited, files maintained and employees aware of changes.
- Prepare for the audit of all student activity and benefits records annually and assist Board-appointed auditor in the annual audit process.
- Assist Assistant Superintendent for Finance & Operations and Assistant Business Manager with the preparation of confidential collective bargaining proposals by accessing, gathering and assembling confidential salary, insurance and benefit information and preparing spreadsheets and other requested information related to costs of salary, insurance and benefit proposals.

- Demonstrate the ability to maintain the confidentiality of school board, collective bargaining and other sensitive District information.
- Coordinate and plan agendas for meetings with District's Insurance Committee.
- Perform other assignments as delegated by the Assistant Superintendent for Finance & Operations and the Assistant Business Manager.
- Maintain retiree insurance enrollments and ensure payments are made promptly.
- Organize and maintain gas mileage spreadsheets for all administrators.
- Create letters of explanation for salary adjustments associated with leaves of absence, "left our employ," or changes to full-time equivalency or position.
- Assist the Payroll Department with:
  - New hire set up with regard to payroll deductions and benefits
  - Sub tracking data base; check for accuracy with number of days, rate of pay, and acct number changes.
  - Receive, compute and process all payroll related data, making deductions for income tax, retirement, credit union, health and dental insurance and all other approved and/or required deductions and benefits. Verify all amounts before and after checks are machine processed.
  - Maintain accurate records of all payroll adjustments – stipends, overtime, garnishments etc.
  - Process stipends; check for accuracy against sign-up sheets from beginning of school year.
  - Bi-monthly processing of payroll checks and accounts payable associated with payroll.
  - Prepare all federal, state and internal financial reports required.
  - Balance and close out each month of transactions including fiscal and calendar year closings, prepare financial statement, income statement and cost reports to reflect the financial conditions of the District as needed.
  - Prepare all withholdings, social security and tax returns relating to payroll matters including W – 2s, quarterly and annual reports.
  - Compile various reports; multi-site reporting (BLS), unemployment reporting (IL state), new hire reporting (IL state).
  - Organize and maintain employee payroll files held in the Business Office.

## **MENTAL DEMANDS**

### *Knowledge*

The employee must have sound knowledge of best practices in benefits and payroll operations; secretarial work; technology usage; and sound skills specific to social interactions.

### *Ability*

The employee shall implement, deliver, and evaluate the district's policies and procedures as defined by the Board of Education; engage in the collaborative dialogue with peers; maintain records and prepare reports; communicate effectively both orally and in writing; read, interpret, apply, and explain policies and procedures; meet the requirements of schedules and time lines; take professional initiative; plan and organize work independently; develop personal staff development; read a variety of materials; handle and maintain the confidentiality of employee, student, school board, collective bargaining, and other sensitive District information; implement a people centered approach to benefits and payroll, problem-solving and conflict-resolution; ability to work cooperatively and effectively with other certified and non-certified personnel and applicants; be of good moral character and possessing temperate, ethical, and industrious habits.

### *Education/Preparation*

Minimum of a high school diploma; experience in a public school system is recommended; familiarity with government fund accounting; familiarity with current financial software programs; experience with administering employee benefits programs and worker's compensation claims.

### *Reasoning*

The employee must have the ability to solve complex problems in situations where only limited standardization exists. Ability to interpret instructions provided through written and oral form.

## **PHYSICAL DEMANDS**

While performing the duties of this job, the employee is regularly required to stand, walk, talk or hear, and taste or smell. The employee frequently is required to use hands to handle or feel materials. The employee is occasionally required to sit; climb or balance; and stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 30 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

## **WORK ENVIRONMENT**

The employee shall possess personal computing skills with the following types of software; web browsers, word processing, spreadsheet, and databases and student database systems. The employee shall use board approved resources, technology, and assistive

technology. While performing the duties of this job, the employee works in a district setting which includes children, and may be subject to noises associated with both an educational environment and other setting such as the gymnasium, lunchroom, LMC, and busses.

*The mental demands, physical demands, and work environment characteristics are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to allow an employee with disabilities to perform the essential functions.*

**REVIEWED/REVISED**

- March 24, 2014