

BENEFITS ACCOUNT REPRESENTATIVE

Purpose Statement

The Benefits Account Representative is responsible for performing a wide range of professional-level activities pertaining to the development, implementation and evaluation of fringe benefit plans and consulting services for Fringe Benefit Consortium (FBC) member districts. The Benefits Account Representative is the liaison for member districts, providing them with day-to-day client service, including assisting member districts with benefits, eligibility and claims inquiries, yearly renewals, and carrier implementation transitions.

Diversity Statement

Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, and being accountable for one's actions and the resulting impact.

Representative Duties

This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties.

Essential Functions

- Provides day-to-day client service to member districts, including assisting member districts with benefit, eligibility, due dates, timelines, claims, service accounts and other inquiries.
- Analyzes Requests for Proposals for the purpose of summarizing for evaluation by Fringe Benefits Specialist.
- Analyzes and evaluates services, coverage, impacts, and options available through insurance carriers to determine the best action plan to meet needs of client organizations.
- Manages benefit plan design development and plan document updates for the purpose of assuring all new legislation is applied properly to various benefit plans.
- Attends meetings and conferences for the purpose of maintaining current knowledge of fringe benefit related regulations and acting as liaison between district and carriers.
- Conducts in-service training for member districts for the purpose of providing information on insurance administration, billing procedures and regulatory changes.
- Coordinates the preparation of Evidence of Coverage books and open enrollment material supply orders for the purpose of ensuring each district's carrier related material needs are met.
- Coordinates the transfer of data to external vendors, plan providers, auditors, and consultants.
- Develops and publishes administrative guides for each line of insurance benefit for the purpose of assisting districts with fringe benefits issues.

- Prepares a wide variety of written materials (e.g. county-wide survey of benefits for all districts, literature for open enrollments, legislative update publications, plan comparisons, contracts, summaries, etc.) for the purpose of providing written reference and/or conveying information.
- Promotes FBC programs for the purpose of increasing interest and participation in programs.
- Researches and resolves eligibility, benefit and claim issues and questions for the purpose of ensuring accuracy of records and maximizing eligible payments.
- Researches, analyzes, and reports on potential financial and/or employee impacts from proposed plan changes stemming from member district negotiations or labor relations issues.
- Reviews contracts for the purpose of assuring correct language and benefit levels prior to circulation for final signatures.

Other Functions

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications

Knowledge and Abilities

KNOWLEDGE of:

Human centered and socially conscious leadership;

Group benefits product lines (i.e., medical, dental, vision, life, AD&D, disability);

Insurance terms;

Federal and state legislation and legal issues related to health and welfare benefits;

Principles of accounting and financial recordkeeping;

Data management principles and procedures;

School district and county office structure, rules, and procedures;

ABILITY to:

Promote a human-centered culture that elevates the strengths of others creating a sense of belongingness;

Practice cultural competency while working collaboratively with diverse groups and individuals;

Maintain confidentiality of data and information;

Manipulate and analyze large amounts of data using spreadsheet programs;

Maintain accurate and reliable records;

Meet assigned deadlines and schedules;

Set effective priorities with minimal supervision;

Work as part of a team;

Work with frequent interruptions.

Working Environment

ENVIRONMENT:

Duties are typically performed in an office setting. This classification may be occasionally required to work nights and weekends on short notice. May be designated in an alternate work setting using computer-based equipment to perform duties.

PHYSICAL ABILITIES:

The usual and customary methods of performing the job's functions require the following physical demands: occasional lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 50% sitting, 30% walking, and 20% standing. The job is performed under minimal temperature variations and under conditions with some exposure to risk of injury and/or illness. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Experience: Three (3) years of professional experience in the employee benefits industry performing comparable scope of duties and responsibilities. Experience with self insured public school fringe benefit programs is highly desirable.

Education: Bachelors degree in degree in business or public administration, insurance or closely related field.

Equivalency: Any combination equivalent to: a bachelor's degree in business or public administration, insurance or closely related field and a minimum of three (3) years of professional experience in a similar position performing comparable scope of duties and responsibilities. Experience with self insured public school fringe benefit programs is highly desirable.

Required Testing

N/A

Certificates

CA Life and/or Health Insurance license
Valid CA Driver’s License

Continuing Educ./Training

Maintains Certificates and/or Licenses

Clearances

Criminal Justice Fingerprint/Background Clearance
Tuberculosis Clearance

FLSA State: Non-Exempt

Salary Grade: Classified Management Grade 035

Personnel Commission Approved: October 19, 2016

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