Position: Benefits Technician	FLSA: Non-exempt
Department: Financial Services	Salary Grade: 11
Reports to: Director of Financial Services	

OVERALL OBJECTIVE AND SUMMARY

Under the direction of the Director of Financial Services, performs a variety of clerical, routine technical duties, and specialist work involving employees' health insurance plan/benefits for District employees, dependents, COBRA, and retirees. Maintains accurate documentation and reconciled records for health benefits and payments. Maintains an electronic data processing system for health benefits records of the District. Coordinates District-wide health and welfare open enrollments and health and wellness fair. Provides information concerning benefits to District staff. Prepares other related work as required.

This position requires an understanding of employee health and welfare systems and the laws, regulations, and reporting requirements. Incumbents at this level must also demonstrate competency in the audit of health and welfare benefits transactions and systems.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Collect and process enrollments, terminations and change information for employee, dependent, COBRA, and retiree health and welfare benefits.
- Counsel enrolled members on effective use of benefits programs. Provide information to eligible employees on the health and welfare benefits programs the District has to offer. Serve as contact person for District staff, Board members, and retirees concerning benefits.
- Maintain provider relations. Acts as District liaison with insurance carriers.
- Establish and maintain files and records pertaining to program participation.
- Review the enrollment and other documents for accuracy and completeness, and forward the material to appropriate carriers. May enter these materials on carriers' enrollment software.
- Provide information on health and welfare policies, rules and regulations. Update informational brochures and other materials as needed.
- Collect and post premiums on the general ledger. Initiate late premium notices and monitor receipt of late payments.
- Interpret and explain health and welfare benefits policies to employees. Conducts employee orientation by explaining health and welfare benefits of the District.
- Prepare packets and provide information concerning benefits to Human Resources staff for inclusion in interviews and employee orientation.
- Process health and welfare benefits payments to health carriers through accounts payable as necessary.

- Reconcile, balance, and verify health and welfare benefits to health carriers' invoices on a monthly basis.

- Prepare correspondence and memoranda for supervisor's review and editing pertaining to various employee benefits related programs, issues, and concerns.

- Record and maintain files on voluntary and involuntary deductions. Mail out warrants for all wage garnishments and voluntary deductions payments.

- Perform a variety of accounting and general clerical functions such as the preparation of statistical reports and summaries, and the gathering of management-related reports. Maintain statistical files, charts, and other information relative to District benefits programs.

- Compile reports for federal, local and private agencies.

- May enter voluntary and involuntary deductions into the District's financial system, as assigned.

- May assist in setting up records and forms for health, welfare, and payroll deductions.

- May set up and participate in insurance review panels.

- May assist with the processing of regular and variable payrolls.

- Perform other duties as assigned that support the overall objective of the position.

QUALIFICATIONS

Knowledge of:

- Accounting practices and generally accepted accounting principles.
- Office practices, procedures and equipment, including filing systems, letter and report writing.
- Personal computer-based software programs that support this level of work, including but not limited to, word processing, spreadsheet, and data entry into custom data bases.
- Proper English usage, grammar, spelling, punctuation, proofreading/editing, and mathematics skills.
- Terminology, policies, practices and procedures of the area to which assigned.
- Telephone techniques and etiquette.
- Oral and written communication skills.

Ability to:

- Learn the laws, regulations, techniques, insurance agreements and procedures pertaining to employee benefits programs.
- Learn integrated/automated health and benefits systems.
- Learn policies, regulations, and negotiated agreements pertaining to employee benefits programs.
- Learn departmental procedures and standing instructions related to work performed.
- Perform all aspects of the position.

- Learn District policies and procedures.
- Learn the District's health and welfare system.
- Prepare clear, complete and concise financial records and analyze accounting data and prepare financial statements pertaining to the area of specialization.
- Conduct technical research, complete complex arithmetic computations and prepare reports.
- Perform responsible tasks pertaining to a comprehensive employee benefits program.
- Effectively resolve employee benefits problems, issues, and concerns.
- Work with staff in a manner that encourages high morale and efficiency.
- Analyze situations and implement effective solutions.
- Learn applicable sections of the current negotiated labor contracts, Education Codes, and other applicable laws and regulations.
- Meet schedules and time lines.
- Apply and explain policies, procedures, rules, regulations and Education Codes involved in assigned activities.
- Work confidentially with discretion.
- Understand and follow oral and written directions.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Type at a minimum rate of 40 words per minute from clear, legible copy and pass a qualifying skills test.

PHYSICAL ABILITIES

This position requires:

- Sufficient hand-eye coordination to use a keyboard for routine typing, 10-key, and data entry, plus arm/hand movements to retrieve work materials and operate a variety of general office equipment.
- Visual acuity to recognize alphanumeric data.
- Some walking, standing, stooping, occasional carrying and lifting of lightweight materials.
- Speaking and hearing ability sufficient to hear over a phone and carry on conversations.

EDUCATION AND EXPERIENCE

An Associate of Arts Degree in general business or accounting plus two years of experience in employee benefit processing and audit is desired. Additional experience may substitute for formal education.

LICENSES AND CERTIFICATES

Typing certificate for 40 wpm