

## **BENEFITS ANALYST**

### **DEFINITION**

Under direction, performs complex and varied administrative and technical work in support of benefit administration and programs for active employees including enrollment, data collection, record keeping, accounting, and workers' compensation claim processing and fund disbursement activities; provides consulting services to San Mateo County Office of Education (Office) personnel related to all aspects of benefit programs and activities; provides specialized and complex assistance and support to the Human Resources Director in area of expertise; and performs related duties as assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives direction from assigned supervisory and management personnel. Exercises no direct supervision over staff.

### **CLASS CHARACTERISTICS**

This journey-level classification is responsible for independently performing technical duties in support of benefit administration. Positions at this level exercise judgment and initiative in their assigned tasks, receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Organizes the operations and activities related to organizational employee benefits programs including enrollment, data collection, record-keeping, accounting, workers' compensation claims processing and fund disbursement activities; provides eligible employees, domestic partners, retirees, and surviving spouses with benefits; ensures compliance with related laws, regulations, policies, and procedures.
- Provides consultation and technical expertise to personnel concerning employee benefits information, insurance plans, enrollment options, eligibility, coverage, and claims; responds to inquiries, resolves issues and conflicts, and provides technical information concerning related policies, procedures, guidelines, rules, and regulations; coordinates and conduct fairs, vendor workshops, and meetings as required.
- Organizes, directs, and participates in the processing and investigation of insurance claims; advises employees of policy provisions and claims procedures; monitors time off and modified duty days due to worker's compensation; prepares required documentation and determines claim eligibility; resolves claims issues as needed; processes, evaluates and ensures proper administration of Workers' Compensation claims as assigned; coordinates the return-to-work program.
- Oversees the leave management program; coordinates with employees to prepare for extended

leaves such as maternity leave; coordinates and advises personnel on the leave approval process; maintains leave tracking system and works with payroll to maintain accurate leave balances.

- Organizes, directs, and participates in enrollment activities; assists employees with completing enrollment forms; processes and evaluates enrollment forms according to established procedures; oversees flexible spending account enrollments.
- Troubleshoots and resolves employee issues and concerns regarding benefits; researches information as necessary; prepares and distributes correspondence to employees, retirees, and plan participants concerning employee benefit plans, policies, procedures, and related information; provides employees with related informational materials; refers staff to outside resources as appropriate.
- Inputs employee benefits and a variety of other data into an assigned computer system; maintains automated employee records and files; generates computerized reports as requested; ensures accuracy of input and output data.
- Serves as a liaison between personnel, payroll staff, insurance brokers, and benefit plan administrators; collaborates with staff, brokers, providers, and others to ensure accurate and timely delivery of employee benefits to employees; reviews renewal contracts and resolves discrepancies with brokers.
- Participates in a variety of activities involved in providing COBRA benefits for eligible employees; coordinates retirement, medical, dental, and vision benefits for early retirees; prepares and processes retirement forms and related benefits.
- Assists management in the planning, design, analysis, and implementation of new benefits programs, policies, and procedures to accommodate legislative changes; develops and monitors operational procedures to enhance workflow and program effectiveness; researches, analyzes, and recommends changes in benefit program design.
- Prepares and maintains of a variety of records and reports related to employee information, benefits, rates, retirements, terminations, insurance plans, contracts, dependents, and other assigned duties; updates forms as needed; establishes and maintains filing systems.
- Interprets, applies, explains, and ensures compliance with federal, state, and local laws and regulations concerning benefits programs.
- Communicates with personnel, insurance providers, brokers, and various other outside agencies to exchange information, coordinates activities and resolves issues or concerns.
- Observes and complies with all Office and mandated safety rules, regulations, and protocols.
- Performs related duties as required.

## **QUALIFICATIONS**

### **Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

- Equivalent to an associate degree from an accredited college with major coursework in public administration, business administration, or a closely related field; and
- Three (3) years of progressively responsible experience working with employee benefit programs in a public agency.

### **Licenses and Certifications:**

This position may require employees to travel locally, and specifically, employees must be able get themselves to different locations during their workday. Employees will be responsible for ensuring that they can timely move between locations during their workday either via driving themselves with a valid

driver's license or using other modes of transportation, including a ride hailing service, taking a taxi, carpooling, bicycling, etc.

**Knowledge of:**

- Principles and practices of benefits administration in a public agency setting.
- Policies and procedures related to benefits administration.
- Methods, techniques, and practices of data collection, data entry, and report writing.
- Summary plan descriptions, vendor contracts, and related forms.
- Payroll practices, procedures, and terminology.
- Processing and evaluation of various insurance claims.
- Applicable federal, state, and local laws, codes, and regulations as well as industry standards and best practices pertinent to the assigned area of responsibility.
- Office and mandated safety rules, regulations, and protocols.
- Business arithmetic and basic financial and statistical techniques.
- Record keeping principles and procedures.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Office staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

**Ability to:**

- Organize the operations and activities related to organizational employee benefits programs including enrollment, data collection, record-keeping, accounting, claims processing and fund disbursement activities.
- Process, evaluate, and assist employees with the completion of enrollment forms.
- Provide consultation and technical expertise to personnel concerning employee benefits information, insurance plans, options, guidelines, and procedures.
- Review and reconcile employee benefit records.
- Perform detailed benefits administration office support work accurately and in a timely manner.
- Maintain confidentiality of sensitive personal information of employees, former employees, and other matters affecting employee relations.
- Troubleshoot and resolve employee issues and concerns regarding benefits.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and Office in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Prepare clear and concise reports, correspondence, documentation, and other written materials.
- Use tact, initiative, prudence, and judgment within general policy and procedural guidelines.
- Organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.

### **PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

### **ENVIRONMENTAL CONDITIONS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing divisional policies and procedures.