LAKE ELSINORE UNIFIED SCHOOL DISTRICT

Position Description

TITLE:	**BENEFITS/RISK MANAGEMENT TECHNICIAN**		
DEPT:	Safety / Risk Services	**REPORTS TO:**	Director of PSS or Designee
JOB FAMILY:	Clerical/Secretarial	**CATEGORY:**	Classified Bargaining Unit (BU)
FLSA:	Non-Exempt	**RANGE:**	42
ISSUED:	**05/09/2025**	**WK DAYS/YR:**	244

JOB PURPOSE STATEMENT:

Under the supervision of the Director of Personnel Support Services, or Designee, to perform a variety of complex and responsible technical and clerical duties in support of health and welfare benefits programs, District's insurance programs, Workers' Compensation, employee benefits and property/liability insurance; provides services for District employees and retirees; serves as an informational resource to District personnel; maintains related records. The incumbents in this classification provide staff and the public with information through the performance of a wide variety of clerical/technical services in support of the District health and welfare benefits programs which directly maintain staff in support of student learning.

DISTINGUISHING CHARACTERISTICS:

The Benefits Technician is distinguished from other classes in the clerical/secretarial job family by responsibility for a variety of complex and diverse clerical and technical duties involving independent judgment and action within the Safety/Risk Management office and requiring in-depth knowledge of District health and welfare benefits programs functions.

ESSENTIAL JOB FUNCTIONS:

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties.

1. Performs complex and responsible technical and clerical duties in support of employee health and welfare benefits programs and services; communicates with District insurance carrier in regards to all District benefit, liability and insurance programs; determines eligibility for new and continuing benefit program and life insurance participants including employees, retirees, COBRA qualifiers and eligible dependents; enrolls eligible employees in benefits programs and services; prepares benefit packets for employees.
2. Performs a variety of clerical/secretarial duties involving independent judgment and requiring in-depth knowledge in support of the functions of the Safety/Risk Services department; processes purchase requisitions and work orders for Safety / Risk Services department; assists in assuring efficient office operations.
3. Serves as an informational resource to District personnel; responds to inquiries, resolves issues and conflicts and provides information concerning District policies and procedures, agreements, Workers' Compensation and employee benefits; assists with procedures and program for Safety/Risk Services; advises District personnel regarding, and obtains Certificates of Insurance for District functions and activities

4. May schedule and conduct individual and group employee orientations concerning benefit programs and services; responds to inquiries and provides information concerning benefits coverage, changes, policies and time lines; assists in planning, organizing, preparing and for open enrollment; assists with new employee benefit handbooks and forms; maintains current information related to employee Health and Welfare benefits on District website.
5. Communicates with plan participants, representatives, sites and various outside agencies; resolves issues, conflicts, discrepancies and concerns as necessary; collects and arranges for payments; reconciles benefit billing and voluntary products for all employees and retirees enrolled in medical, dental, vision and life insurance; reviews and audits insurance billings for accuracy; coordinates coverage with sites/administrator for Student Accident insurance; coordinates payment for Worker's Compensation billing for open claims.
6. Receives, processes and analyzing employee enrollment and a variety of other forms and applications; submits claim forms for deceased individuals; reviews for accuracy and completeness; assists employees with completing enrollment forms; establishes and maintains employee records and files.
7. May assist in monitoring status of disabled employees and Workers' Compensation claims; fringe and leave benefits; return-to-work arrangements for injured employees; processing claims regarding property, liability/vandalism throughout the District.
8. Supports the district's Property and Liability insurance program by creating and monitoring purchase requisitions for District insurance claims.
9. Compiles data and prepares and maintains a variety of records, logs and reports related to employees, Health and Welfare Benefits, fringe benefits, Workers' Compensation claims, leaves, COBRA, retirement, property and liability; establishes and maintains filing systems.
10. Inputs a variety of employee benefits-related data into an assigned computer system; maintains automated records; initiates queries, extracts data and generates a variety of computerized lists and reports; verifies accuracy.
11. Operates a variety of office equipment including a calculator, copier, fax machine, computer and assigned software.
12. Assists with a variety of special events such as Health Fairs, Wellness Clinics, Safety Advisory meetings, assists with radio communication to sites during emergency drills; supplies inventory for emergency preparedness
13. Creates and monitors the progress of purchase requisitions to order equipment to support employee needs as defined through the Interactive Process including securing ergonomic specialists to conduct employee workstation assessments.
14. Processes a variety of forms related to volunteers, retirees, COBRA, disability requests, accommodations assessment, CalPERS, personal physicians, child support, disability, etc.
15. Performs other functions, duties and tasks related to this class as assigned (e.g., District-required training).

JOB REQUIREMENTS – QUALIFICATIONS

Knowledge of:

1. General employee benefits and insurance programs and procedures
2. Methods of auditing insurance billings and coordinating payments
3. Proper office methods, standard personnel procedures, techniques and practices of personnel record keeping; including report writing and proper telephone techniques; general and accounting bookkeeping principles and procedures related to assigned areas of responsibility
4. Practices, procedures, techniques, forms and applications involved in enrolling employees in benefits program
5. State and District laws, rules and regulations Safety and Risk Management related topics.
6. Appropriate English usage, spelling, grammar, punctuation, and arithmetical concepts
7. Standard office machines and equipment, including computers and pertinent software applications

Skills:

1. Keyboarding accurately at an acceptable rate of speed
2. Perform basic arithmetic calculations
3. Establish and maintain a variety of complex and sensitive files and records
4. Establish and maintain cooperative working relationships with staff, students and the public

Ability to:

1. Perform complex and responsible technical and clerical duties in support of employee health and welfare benefits programs and services for District employees and retirees
2. Operate standard office equipment, including use of specialized computer applications
3. Using English in both written and verbal form, correct spelling, grammar, punctuation
4. Learn and apply District policies and procedures related record keeping requirements
5. Utilize pertinent software applications; perform standard clerical and secretarial procedures; perform standard record keeping procedures
6. Maintain confidentiality regarding sensitive personnel information and records
7. Work courteously and tactfully with co-workers, public, pupils and parents
8. Participate in team building and a maintaining professional work environment
9. Learn new skills and adapt easily to new work assignments, additional priorities and new procedures due to changing job conditions and/or technology
10. Adhere to safety practices and work under time constraints
11. Work without close monitoring and meet deadlines
12. Sit for prolonged periods, work independently under minimal supervision accurately with attention to detail, understand and carry out oral and written instruction

EDUCATION REQUIRED:

High school diploma or equivalent.

EXPERIENCE REQUIRED:

Two (2) years increasingly responsible experience clerical/technical and/or accounting work, preferably within a public school district setting.

LICENSE REQUIRED:

8. Possession of a valid California Driver's License and remain insurable at the District's standard insurance market rate. Current DMV report.
9.

CERTIFICATIONS AND TESTING REQUIRED:

1. Pass the District's applicable Proficiency Exam for the job class with a satisfactory score.
2. After offer of employment, obtain:
   a. Criminal Justice and FBI Fingerprint Clearance at candidate's expense
   b. Negative pre-employment drug screen test through District's provider at District's expense
   c. Pre-employment physical exam through District's provider at District's expense
   d. Negative TB test result at candidate's expense plus periodic post-employment retest (currently every four years) as required through District's provider at District's expense

WORKING CONDITIONS:

1. Lifting/carrying/pushing/pulling up to 35lbs unassisted and 36lbs or more assisted.
2. Work is primarily indoors and requires sitting for extended periods
3. Hearing and speaking to exchange information
4. Sitting or standing for extended periods of time
5. Bending at the waist, kneeling or crouching to file materials
6. Dexterity of hands and fingers to operate a computer keyboard and maintain paper files and documents
7. Visual acuity to see/read documents and computer screen