

SANTA CRUZ COUNTY OFFICE OF EDUCATION
SENIOR ACCOUNT SPECIALIST, BENEFITS

DEFINITION

Under direction of an assigned administrator, perform a variety of high-level specialized duties in support of employee benefits programs including eligibility, enrollment, data collection, record-keeping, accounting, claims processing and fund disbursement activities; serve as a technical resource to personnel concerning employee benefits information, eligibility, insurance plans, options, guidelines and procedures. Maintain employee leave accruals, usage and balances. Incumbents are expected to identify those problems which require attention from supervisory personnel and to use good judgment in applying accounting or administrative procedures to remaining problems.

SUPERVISION EXERCISED

No supervision exercised.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

Provide eligible employees, dependents, domestic partners, retirees, and surviving spouses with benefits and coordinate related benefit activities.

Serve as a technical resource to human resources concerning employee benefits information, insurance plans, eligibility, enrollment options, coverage and claims; respond to inquiries, resolve issues and conflicts, provide technical information concerning related policies, procedures, guidelines, rules and regulations.

Interpret, apply and explain benefit plan designs, changes, policies and procedures to employees.

Conduct workshops, trainings, meetings, and new hire orientations as required.

Perform various enrollment activities, assist employees with completing enrollment forms; process and evaluate enrollment forms according to established procedures; and establish and maintain employee benefits records.

Reconcile invoices from insurance companies, prepare related reports as requested; calculate, monitor, and assure accuracy and proper distribution of various fees and disbursement including benefit payments and retiree entitlements, accounts receivable duties including monitoring and processing incoming payments.

Act as a liaison between personnel, insurance brokers and benefit plan administrators. Collaborate with staff, brokers, providers and others to assure accurate and timely delivery of employee benefits to employees. Review contract renewals and health benefits renewals and resolve discrepancies with brokers.

Troubleshoot and resolve employee issues and concerns regarding benefits; research information as necessary; prepare and distribute correspondence to employees, retirees and plan participants concerning employee benefit plans, policies, procedures and related information; provide employees with related informational material, refer staff to outside resources as appropriate.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES (CONTINUED)

Communicate with personnel, insurance providers, vendors, brokers and various outside agencies to exchange information, coordinate activities and resolve issues or concerns regarding benefits plans, eligibility, and coverage.

Receive, process and assure accuracy and completeness of documentation concerning new personnel, status changes, transfers and terminations. Update employee records as appropriate, notify employees and benefit providers of changes in status and eligibility.

Compile information, prepare and maintain a variety of records and reports related to employee information, leave activity, benefits, rates, retirements, terminations, insurance plans, contacts, payments, financial activity and other assigned duties; establish and maintain filing systems.

Prepare monthly billings audits for outside services and carriers such as medical, life, disability, Medicare Part D, vision, dental, and Section 125 vendors.

Gather, compile data and prepare reports and insurance eligibility lists; respond to questionnaires, surveys and requests for information.

Responsible for monitoring legislative and legal changes, participate in available trainings to ensure compliance.

Prepare and maintain logs, records, and statistical data in the area of assignment.

Interpret and evaluate, leave activity, benefit related records and reports to assure accuracy, completeness and compliance with established guidelines, rules, regulations, and procedures; identify, investigate and resolve discrepancies.

Monitor legal documents for compliance with state and local laws, rules, regulations, policies and procedures.

Prepare and assist in the preparation of Federal and State-mandated reports in accordance with established timelines as assigned.

Answer questions regarding rules and regulations, leave account balances, and benefit related matters, resolve problems.

Comply with the Santa Cruz County Office of Education board policies and administrative regulations.

Maintain employee leave accruals, usage, and balances.

Prepare deposits.

Serve as backup for other personnel within the payroll department as needed.

File and process routine documents.

May answer section telephones.

Perform other job-related tasks as required.

OTHER JOB RELATED DUTIES

Payroll:

Process benefit paperwork and deposits including but not limited to: medical, dental, vision, long-term disability and life insurance.

Absence tracking; understand and interpret leaves.

Understand and apply rules and regulations surrounding health care laws.

Interpret and comply with new tax and benefit laws and regulations.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Knowledge of:

Methods, procedures and terminology used in benefits administration.

Employee benefit packages and insurance programs.

Summary plan descriptions, vendor contracts and related forms.

Practices, procedures and terminology related to accounting, payroll, benefit enrollment, leave usage and accruals, and collective bargaining agreements.

Processing various insurance claims.

Applicable laws, codes, regulations, policies and procedures including COBRA, ACA, HFA, FMLA, CFRA, HIPAA; Domestic Partner taxation; collective bargaining agreements; leave types, usage and accruals; Section 125 Plans; and other fringe benefits.

Principles and techniques involved in benefits account preparation and processing.

Accounting procedures as they relate to various federal, state, local, and school district policies and regulations.

Advance Excel and data manipulation.

Oral and written communication skills.

Interpersonal skills including tact, patience and courtesy.

Mathematical computations.

Correct English usage, grammar, spelling, punctuation and vocabulary.

Skill and Ability to:

Perform a variety of technical duties in support of employee benefit programs including eligibility, enrollment, data collection, record-keeping, accounting, claims processing and fund disbursement activities.

Skill and Ability to (continued):

Serve as a technical resource to personnel concerning employee benefits information, insurance plans, eligibility, options, guidelines and procedures.

Process, evaluate and assist employees with the completion of enrollment forms.

Troubleshoot and resolve employee issues and concerns regarding benefits and leave usage, accruals, and balances.

Perform a variety of accounting duties including fund disbursement and accounts receivable functions.

Serve as a liaison between personnel, insurance providers and benefit plan administrators.

Prepare and maintain employee benefits records and files.

Update records and notify personnel with changes in benefits due to changes in employment status.

Prepare professional correspondence for routine communications with employees, the general public and private agencies; communicate in a manner that reflects positively on the Santa Cruz County Office of Education.

Operate a computer and assigned software, standard office machines, operate a calculator and type with speed and accuracy.

Reconcile, balance, verify, and adjust assigned accounts and budgets.

Interpret, apply and explain pertinent laws, rules, regulations, policies, procedures, techniques and complex rules governing benefits plans and leave usage and accruals.

Perform responsible clerical accounting work using independent judgment and initiative.

Determine steps or procedures used to assemble, organize and prepare data for records and reports.

Establish and maintain effective working and cooperative relationships with others.

Understand and implement time management tools to plan and organize work, to ensure efficiency, and meet schedules and timelines.

Compare names and numbers rapidly and accurately detect, correct, or report errors efficiently.

Perform routine and repetitive work to completion.

Attend meetings, conferences, classes and in-service trainings.

EDUCATION AND EXPERIENCE

Any combination equivalent to experiences and training that would provide the required knowledge, skills, and abilities would be qualifying. A typical way to obtain the knowledge, skills, and abilities would be:

Education:

Equivalent to the completion of a Bachelor's degree with course work in accounting, bookkeeping or a related field.

Experience:

Three to five years of increasingly responsible technical experience in accounting, bookkeeping, payroll, benefits, human resources or a related field. Experience in a school district or in a county office of education is preferred.

License or Certificate:

Possession of, or ability to obtain, a valid California driver's license and appropriate vehicle operation insurance preferred.

Qualification Requirements:

To perform a job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed in the job description are representative of the knowledge, skills, and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

SPECIAL REQUIREMENTS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Essential duties require the following physical skills and work environment:

While performing the duties of this job, with or without the use of aids, the employee is regularly required to sit, stand or walk for extended periods of time; dexterity of hands and fingers to operate a computer, telephone and other standard office equipment; see and read a computer screen and printed matter; hear and understand speech at normal levels on the telephone or in person; speak so that others may understand at normal levels and on the telephone; and grasp, push, pull and move, lift and/or carry up to 10 pounds.

Ability to work in a standard office environment with some ability to travel to different sites and locations.

Approval Date: June, 2019