



CAJON VALLEY UNION SCHOOL DISTRICT PERSONNEL COMMISSION

Job Class Description

<u>BENEFITS SPECIALIST</u>			
DEPARTMENT/SITE:	Payroll Department	SALARY SCHEDULE:	Classified Bargaining Unit
		SALARY RANGE:	31 Schedule
		WORK YEAR:	12 Months (260 Days)
REPORTS TO:	Payroll & Benefits Supervisor	FLSA:	Non-Exempt

BASIC FUNCTION:

Perform a variety of specialized duties in support of the District's employee benefits programs and services; provide information to District employees regarding health and welfare benefits; assist in coordinating open enrollments; plan and prepare health fairs; serve as a liaison between insurance companies and employees. Prepare monthly billing audits and reporting of applicable benefit programs.

DISTINGUISHING CHARACTERISTICS:

The **Benefits Specialist** provides information and guidance to employees and retirees through every phase of the benefits process, performing a wide range of complex and highly technical and analytical duties related to employee leave, retirement, and benefits programs. The **Payroll & Benefits Technician** performs technical data entry to support the benefits and services programs, providing initial information on District health and welfare benefits.

ESSENTIAL FUNCTIONS, DUTIES, AND TASKS:

The following list of functions, duties, and tasks is typical for this classification. Incumbents may not perform all the listed duties and/or may be required to perform other closely related or department-specific functions, duties, and tasks from those set forth below to address business needs and changing business practices.

Perform a variety of specialized duties in support of the District's employee leave and benefits programs and related services; ensure compliance with applicable laws, codes, rules, and regulations.

Meet with new hires and employees to inform, discuss, and clarify District leave, retirement, health, and welfare benefits; provide information and assistance to employees with insurance updates and qualifying events; assist in the enrollment of employees and dependents into District health plans.

Serve as a liaison between employees and insurance company representatives and agents; remain current on vendor and legislature policy changes; organize and maintain information, procedures, and forms regarding insurance benefits programs provided by the District for employees; maintain and update District benefits website page(s).

Apply, interpret, and explain employee available leaves in accordance with bargaining unit contracts, Family Medical Leave Act (FMLA), California Family Rights Act (CFRA), and other pertinent laws, regulations, and procedures; collaborate with Payroll on leave salary adjustments.

Prepare and maintain a variety of records, files, and reports related to employee leave, retirement (CalSTRS & CalPERS), and benefits information; cost out benefits projections as requested; provide budget estimates as requested; comply with local, state, and federal reporting.

Assist in coordinating District-wide open enrollments; plan and prepare District's health fair with vendors; compose related communications; organize publication and distribution of insurance packets; participate in the District's insurance benefits committee meetings.

Monitor Consolidated Omnibus Budget Reconciliation Act (COBRA) eligibility; provide COBRA letters to eligible employees or dependents experiencing a loss of benefits; provide monthly payment coupons to individuals extending coverage; serve as a liaison between the District and the insurance consultant.

Prepare monthly billing audits for services and carriers including medical, life, vision, dental, and voluntary benefits agencies; verify and resolve related discrepancies; issue payment requests to the accounting department based on audits and in accordance with established timelines.

Collaborate with Risk Management and Payroll to inform and clarify workers' compensation status; assist in processing workers' compensation indemnity payment records for individual claims; prepare salary abatement reports; track leave in accordance with workers' compensation leave benefits.

Process life insurance claims; ensure proper paperwork is completed.

Prepare correspondence to eligible retirees; provide annual, semi-annual, and quarterly billings as required.

Operate a variety of office equipment including a calculator, copier, fax machine, scanner, computer, and assigned software.

Attend, conduct, and participate in various meetings and committees as assigned; drive a vehicle to conduct work.

Perform classification-related duties as assigned for ensuring the efficient and effective functioning of the work unit and the District, including various mandatory District trainings.

KNOWLEDGE AND ABILITIES:**KNOWLEDGE OF:**

Methods, practices, terminology, and procedures used in benefits administration.

Employee benefits packages and insurance programs.

Employee benefits enrollment practices and procedures.

Policies and objectives of assigned programs and activities.
District/bargaining union policies and procedures.
Applicable laws, codes, rules, and regulations including COBRA, FMLA, and CFRA regulations.
Various health and life insurance plans, coverage, and exclusions.
Record-keeping and report preparation techniques.
Preparation, review, and control of assigned accounts.
Modern office practices, procedures, and equipment.
Operation of a computer and assigned software.
Interpersonal skills using tact, patience, and courtesy.
Correct English usage, grammar, spelling, punctuation, and vocabulary.
Oral and written communication skills.
Mathematical computations.

ABILITY TO:

Perform specialized duties in support of various employee benefits programs including enrollment, orientation, and record-keeping functions.
Serve as a specialized resource and liaison to personnel concerning employee benefits information, insurance plans, options, guidelines, and procedures.
Respond to requests and inquiries from District employees.
Troubleshoot and resolve employee issues and concerns regarding benefits.
Explain health plan coverage to employees.
Reconcile, balance, and audit assigned accounts.
Assist in coordinating open enrollments.
Plan and prepare health fairs.
Learn, interpret, apply, and explain applicable laws, codes, rules, regulations, policies, and procedures.
Assemble, organize, and prepare data for records and reports.
Perform mathematical computations with speed and accuracy.
Plan and organize work to meet deadlines, schedules, and timelines.
Maintain records and files and prepare reports.
Compose correspondence and written materials independently.
Understand and resolve issues, complaints, and/or problems.
Keyboard or input data at an acceptable rate of speed and accuracy.
Communicate effectively both orally and in writing.
Establish and maintain cooperative and effective working relationships with others.
Operate a variety of office equipment including a computer and assigned software.
Maintain confidentiality of sensitive and privileged information.
Work independently with little direction.

EDUCATION AND EXPERIENCE:

Any combination equivalent to graduation from high school and two years of college-level coursework in accounting, human resources, business, public administration or related field, and four years of responsible experience performing varied employee benefits or related human resources activities. Public sector or school district experience preferred.

WORKING CONDITIONS:

ENVIRONMENT:
Office environment

PHYSICAL DEMANDS:
Hearing and speaking to exchange information in person and on the telephone.
Dexterity of hands and fingers to operate a computer keyboard.
Seeing to read a variety of materials.
Sitting for extended periods of time.
Bending at the waist, kneeling, or crouching to file materials.

JOB CLASS HISTORY

New Approved-PC:06/2024, GB:06/2024