

## SANTA CLARA COUNTY OFFICE OF EDUCATION

### **CLASS SERIES TITLE: EMPLOYEE BENEFITS SPECIALIST I/II**

#### **BASIC FUNCTION:**

To perform highly responsible functions and tasks relating to the employee benefits programs of the County Office of Education including, but not limited to, enrolling and orienting employees regarding benefit programs, paying insurance carriers for coverage, charging costs to appropriate program fund accounts, facilitating unemployment insurance claim processing, maintaining tuberculosis records, processing invoices, and tax shelter account changes, voluntary payroll deductions, and establishing direct deposit payroll accounts.

#### **ALTERNATE CLASS SERIES SPECIFICATIONS:**

The Employee Benefits Specialist I and the Employee Benefits Specialist II serve as an alternate class series. Persons may be initially employed in either level depending on their qualifications. Persons employed in the entry-level classification may reasonably expect to be reassigned to the journey level classification upon the recommendation of the appointing authority. It is expected that a person employed as an Employee Benefits Specialist I will be prepared for reassignment to Employee Benefits Specialist II within a two-year period.

#### **DISTINGUISHING CHARACTERISTICS:**

The Employee Benefits Specialist I is the entry level of the alternate class series. Persons appointed to this classification receive training to learn the rules, laws, policies and procedures associated with the group employee benefit programs operated by the Santa Clara County Office of Education. Persons receive general supervision and are initially assigned limited responsibilities which are expanded in size and complexity as their job knowledge increases.

The Employee Benefits Specialist II is the journey level of the alternate class series. Persons appointed to this classification demonstrate job knowledge assuring for the effective establishment, application, and implementation of the group employee benefit programs and health insurance coverage operated by the Santa Clara County Office of Education. Incumbents receive limited supervision and perform a wide range of complex personnel technical support functions that require initiative, accuracy, attention to detail, organizational skills, and the ability to focus on multiple tasks within stringent timelines.

#### **ESSENTIAL/TYPICAL DUTIES:**

*The following duties are examples of assignments performed by incumbents in this classification. It is not a totally comprehensive list of duties, nor is it restrictive regarding job assignments.*

Processes new and current employees for enrollment into all health care benefits, makes dependent changes or other status changes to benefits coverage, orienting employees regarding programs and coverage, overseeing enrollment intake activities, and changing costs in computerized systems for charging benefits costs to appropriate program fund accounts

Provides routine and specialized employee benefits information to, and responds to inquiries from

employees, retirees, carriers, physicians, attorneys, and others for a variety of subjects, including, but not limited to, benefits coverage, eligibility, claims procedures, work-related injuries, medical leaves, and disability status

Assists with various special projects related to assigned functions

Prepares payment of insurance costs to vendors, reconciling monthly invoices, adding and deleting members, determining correct invoice totals, and issuing warrants

Audits monthly payment to insurance vendors, comparing amounts against payroll reports and charging benefits costs to appropriate program fund accounts

Adjusts discrepancies, ensuring proper charging of costs to offset funds spent for insurance coverage and including payroll charges for districts' share of benefits costs

Processes mandatory and voluntary deductions for employee payroll records, maintaining and updating computerized records for premium contributions of part-time employees, tax shelter annuities, Flexible Spending Accounts (FSA), member union dues and non-member service fees

Provides exceptional customer service functions to internal and external clients, vendors and with all levels of staff

Assists employee beneficiaries with life insurance and accidental life claims

Processes requests for direct deposit accounts for employees

Processes and monitors unemployment insurance claim records; prepares specialized reports and provides employment information to the Employment Development Department (EDD)

Prepares invoices of insurance costs for retirees, persons on COBRA status, and persons on unpaid leave, works closely with accounts receivable to ensure that payments are received and credited to participant's account

Prepares, processes, and distributes COBRA notifications, special forms, and/or correspondence to persons leaving employment, dependents of persons leaving employment, persons filing unemployment insurance claims, persons who are retiring, or persons placed on unpaid status regarding eligibility for continued coverage and periodic premium changes; advises retiring employees regarding benefit coverage options including MEDICARE

Processes short and long-term disability information for all new claims, facilitates employment information relating to unemployment insurance claims, maintaining and updating appropriate records, transmitting payroll information to insurance carriers, and sending benefit checks received to participants

Updates benefits costs as premiums change, ensuring correct costs charges to programs

Maintains and monitors employee tuberculosis records, preparing and distributing clinic

announcements, and correspondence to employees with soon to be or expired tuberculosis results, updating employee records and files with results, and recommending unpaid status for employees who do not comply with mandated tuberculosis requirements

Establishes, updates, and retrieves electronic employee benefit files for all eligible employees

Serves as an intermediary between employees, insurance carriers third-party administrators, and agents to resolve problems, answer questions, verify fund transfers/loans, and facilitate claims processes including life insurance, unemployment insurance and FSA claims

Provides training for other public schools' staff on benefits processing, coverage, unemployment insurance, and computerized systems, serving as a resource regarding related policies, rules, procedures, and regulations

Performs end of year closing, ensuring proper reporting of domestic partnership records and adjustment of benefits accounts, appropriate charging of costs to programs, and correct carry over balances to the next fiscal year

Develops, prepares, maintains a variety of routine or specialized correspondence, documents, reports, files, and records related to assigned functions

Operates desktop computer hardware and software including spreadsheet and word processing programs, entering and maintaining related data into accounting, human resources and payroll information systems

Provides responsible assistance in other human resources functions, performing tasks related to employee identification badge processing, participation in COE job fairs, and general employment

Performs related duties as assigned

## **EMPLOYMENT STANDARDS:**

Knowledge of:

General principles and procedures of accounting, budgeting, bookkeeping, and fiscal record keeping as related to employee benefits and related insurance programs

Internal fiscal controls and policies

Appropriate laws, codes, standards, guidelines, contractual agreement sections, and reporting requirements related to employee benefits and insurance programs

Modern office methods, principles, and procedures

Standard office equipment including desktop computer, printer, scanner, calculator, copier, and fax machine

Software application programs for word processing and spreadsheets

Proper English usage including grammar, punctuation, spelling, and sentence structure

Ability to:

Perform a variety of specialized work assignments related to employee benefits processing, cost distribution, workers' compensation, and system maintenance

Plan, organize, and prioritize work assignments to meet time requirements and facilitate workflow

Analyze, interpret, and apply pertinent codes, laws, rules, and regulations related to employee benefits assignments

Analyze and interpret a variety of fiscal and program information and data related to employee benefits work

Understand and apply internal fiscal controls in the performance of work assignments

Identify problem areas or situations, determine problem causes, and take appropriate action to resolve identified problems

Prepare and maintain accurate employee, COBRA and retiree records, financial summaries and benefits reports

Communicate effectively in oral and written form

Maintain professionalism and confidentiality in the course of all personnel interactions and transactions

Advise and assist employees and/or their dependents in crisis situations in a sensitive and confidential manner

Perform complex mathematical/statistical calculations quickly and accurately identify and correct errors in arithmetical calculations made by others

Keyboard at a rate that ensures successful job performance

Operate standard office equipment and machines including desktop computer, copier, fax machine, scanner and calculator

Skillfully use computer software related to work assignments

Establish and maintain effective work relationships with those contacted in the course of assigned duties.

**EDUCATION, TRAINING AND EXPERIENCE:**

*Employee Benefits Specialist I:* A combination of education, training and experience which clearly demonstrates possession of knowledge, skill and abilities detailed above. A typical qualifying background would include one year fiscal/statistical record keeping experience related to group employee benefits and/or health insurance programs. Experience must include maintaining computerized records. College-level course work in human resources, public administration, or a related field is highly desirable.

*Employee Benefits Specialist II:* A combination of education, training and experience which clearly demonstrates possession of knowledge, skill and abilities detailed above. A typical qualifying background would include three years fiscal/statistical record keeping experience related to group employee benefits or similar health insurance programs. Experience must include maintaining computerized records, and interpreting and applying complex laws, rules and regulations. Experience providing technical leadership is desirable. College-level course work in human resources, public administration or a related field may be considered as partial fulfillment of the work experience requirement.

**WORKING CONDITIONS:**

Generally, duties are primarily performed in an office environment while sitting at a desk. Incumbents are subject to contact with or constant interruptions by staff, employment candidates and/or employees.

**PHYSICAL DEMANDS:**

Hearing and speaking to exchange information in person and on the telephone; seeing to read, prepare and proofread documents; sitting for extended periods of time; dexterity of hands and fingers to operate a computer keyboard and other office equipment; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects.

BARGAINING UNIT: Office, Technical, and Business Services (OTBS) Unit

Approved by Personnel Commission: September 25, 1984; Revised Approval: June 24, 1985; January 1989; March 1989, June 2001; June 11, 2009; November 12, 2009; December 9, 2015



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Director-Classified Personnel Services

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