



Classification Title: Benefits Specialist

Department:	Human Resource Services	EEO6 Code:	5
Employee Group:	Classified	Salary Grade:	26
Supervision Received From:	Supervisor, Benefits	Date of Origin:	7/2024
Supervision Given:	General Supervision	Last Revision:	7/2024

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed by individual positions.

JOB SUMMARY.

Performs highly responsible paraprofessional and administrative duties in administering the District's pre- and post-tax benefits plans, ensuring compliance with all federal, state and local legal and regulatory requirements; counsels employees and retirees and provides information on the requirements and uses of differing plans' coverages and options; coordinates leave of absence management processes in compliance with all legal requirements; administers COBRA and provides technical/administrative support for Healthcare Saving Account plan and post-employment retiree medical plan offerings; provides support for the District's workers' compensation program and return-to-work/accommodation processes; processes benefit plan and leave elections, terminations, changes and other related transactions for Payroll purposes; maintains up-to-date records and bills participants, receives payments, makes collections and reports and transmits funds to Fiscal Services for COBRA, retiree, terminating employee and other non-payroll benefit plan contributions.

DISTINGUISHING CHARACTERISTICS.

The Benefits Specialist independently performs a wide variety of highly responsible paraprofessional, technical and administrative duties involved in administering the District's comprehensive employee benefits program offerings available to classified, administrative, full- and part-time faculty and retirees, in compliance with all applicable federal, state and local regulations, laws, policies and contract provisions. The employee administers the District's COBRA plan, coordinates administration of the District's leave management program and provides support for administration of the workers' compensation and return-to-work programs. Work requires both a detailed understanding of multiple types of benefits and plan offerings and the legal and regulatory compliance requirements for such plans as well as interpersonal sensitivity and the skills needed for counseling employees on plans and options to meet their personal needs, often at time of stress and high emotion.

This classification is distinguished from the class of Human Resources Specialist by the incumbent's specialization in benefits plan administration, ranging from pre- and post-tax benefits plans to leave of absence and pre-retirement counseling and transitioning employees into retirement and associated health benefits including Medicare.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS.

Essential Functions: Essential responsibilities and duties may include, but are not limited to, the following:

1. Participates in administering the District's comprehensive benefits program, including health plans, long-term disability, health savings account and deferred compensation plans for employees, administrators, full- and part-time faculty, retirees and individuals on leaves of absence; interprets and explains Internal Revenue Service (IRS) code and other legal and regulatory requirements governing the use and administration of pre-tax benefit plans; administers

health, dental, life, long-term disability voluntary insurance plans and retirement plans offered through a variety of carriers and providers.

2. Interprets, explains and applies technical knowledge of complex benefit plan requirements and procedures to employees, retirees and beneficiaries; serves as liaison and advocates for the resolution of employee benefits concerns and coverage/payment problems with carriers and vendors to resolve matters in the best interests of the employee and the District; provides guidance to employees, retirees or beneficiaries regarding claims, coverage and eligibility issues.
3. Plans, organizes and conducts annual benefits program open enrollments and as-needed new hire benefits orientation and enrollment processes, as well as every-semester de novo enrollments of eligible part-time faculty; prepares and distributes benefits communication materials and conducts open enrollment meetings; distributes benefit plan descriptions, promotional materials and notices in compliance with legal and regulatory requirements; maintains up-to-date website information on benefits, plan changes and key enrollment dates; explains, interprets and advises employees regarding employee benefit plan coverage, coverage changes, eligibility for benefits and claims procedures; for new hires and open enrollment changes, verifies employee, part-time faculty, retiree and dependent plan eligibility and ensures accurate completion of enrollment forms; processes enrollments including changes to elections in PeopleSoft and with insurance carriers.
4. Coordinates the District's processes for the approval and management of leaves of absence including Family Medical Leave Act (FMLA), maternity/paternity leave under the California Pregnancy Disability (PDL) and Family Rights Acts (CFRA), short-term (STD) and long-term disability (LTD) leaves and military leaves, as well as leave requirements established in the California Education Code and District policies and contract provisions; advises managers and employees on leave options and requirements and available leave balances and processes leave requests; tracks required medical and personal certifications; prepares payroll adjustments; monitors the leave balances of employees on short-term leaves; works with employees to transition to LTD and assists employees in completing LTD benefit applications; transitions employees exhausting leave balances and plan benefits to the 39 Week List; assists employees in initiating disability retirement applications; ensures compliance with applicable leave regulations; tracks and makes arrangements for premium payments during leaves.
5. Administers the District's Consolidated Omnibus Budget Reconciliation Act (COBRA) plan; conducts open enrollment meetings and notifies eligible individuals of plan offerings, plan changes and costs; processes enrollments, establishes accounts, tracks eligibility periods and ensures compliance with legal and regulatory requirements.
6. Sets up employee elections for Health Savings Accounts and creates a spreadsheet for employee and employer contributions for Payroll processing; oversees and tracks maintenance of employee HSA accounts in the plan administrator system; prepares and coordinates wire transfer and fund allocation requests with Fiscal Services; ensures District compliance with legal requirements regarding eligibility and contribution maximums; oversees and tracks employee participation and contributions to 403B and 457B plans; ensures additions, changes, corrections and terminations are properly processed in the vendor system.
7. Conducts preretirement counseling sessions with employees to review service and disability retirement policies, procedures and retirement law, including available benefits and options; assists retirees with retirement applications, and the transitioning of employees, based on their benefits eligibility, to retiree health and dental plan options as well as Medicare.
8. Maintains records and bills retirees, COBRA enrollees and employees on leave who are participating in District benefits plans for premium contributions; collects required payments and follows up to ensure payments are current; transmits funds to Fiscal Services and works with Fiscal Services to ensure the timely resolution of payment problems; ensures payment records and balances are correct.
9. Assists in administration of the workers' compensation program; takes initial reports of injury and claims; sends claims to the District's claims administrator and sets up claimant files in the administrator's claims system; acts as a liaison between employees, the claims administrator and medical providers; assists in the timely processing of medical bills and claims; coordinates absence information with the applicable department, employee and Payroll to ensure prompt payment of benefits; provides support for the return to work process including work accommodations where

warranted.

10. Drafts a variety of correspondence and communication materials; develops, maintains and prepares certificates as required by the Health Insurance Portability and Accountability Act (HIPAA) or by carriers for other purposes.
11. As requested, serves on assigned committees and serves as the recorder; takes and transcribes meeting minutes; schedules meetings, and prepares and posts agendas and meeting notices.

Marginal Functions:

1. Provides backup and administrative support for other department staff as requested.
2. May provide guidance and direction to student and short-term employees.
3. Performs related duties and responsibilities as required.

QUALIFICATIONS.

Experience and Education/Training Guidelines: Any combination of experience and education/training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience: Five years of employee benefits administration experience.

Education/Training: Equivalent to completion of the twelfth grade.

Preferred Qualifications:

Completion of college-level coursework in human resources, business administration or related field from an accredited college or university.

Knowledge of:

1. Principles, practices, methods and techniques of benefit program design and administration, including eligibility determination, enrollment, claims processing, benefits reporting and insurance/benefit plan recordkeeping.
2. Federal, state and local laws and regulations governing the administration of pre- and post-tax benefit plans, including COBRA and Health Savings Accounts, and maintenance of plan/employee records including HIPAA.
3. Standard employee benefit plan contract and coverage provisions and requirements.
4. California Labor Code and workers' compensation law at a level applicable to assigned responsibilities.
5. Medical and technical terminology used in the medical and legal fields regarding industrial injury and illness cases.
6. Payroll and audit methods and procedures.
7. Maintenance of medical claims files and records.
8. Principles and practices of sound business communication; correct English usage, including spelling, grammar and punctuation.
9. Principles, practices, concepts and techniques used in customer service and public relations.
10. Functions, rules, policies and procedures applicable to assigned areas of responsibility.
11. Research methods and data analysis techniques.
12. Provisions of the California Public Records Act and the Ralph M. Brown Act.
13. Enterprise software, general accounting systems and associated systems, practices and procedures for processing information and interpreting input and output data.

14. Modern office practices, procedures and equipment including computers and applicable software programs.
15. Basic recordkeeping practices and procedures.

Skill in:

1. Coordinating, as assigned, and participating in the day-to-day administration of the District's portfolio of pre- and post-tax benefit plan offerings.
2. Analyzing complex benefits issues and problems, evaluating alternatives and making appropriate decisions and recommendations.
3. Understanding, interpreting, explaining and applying complex insurance and benefit plan laws, regulations, contract provisions, policies and procedures.
4. Understanding, interpreting, explaining and applying basic provisions of workers' compensation laws.
5. Organizing, setting priorities and exercising sound independent judgment and initiative within areas of assigned responsibility.
6. Composing clear, concise and comprehensive analyses, correspondence, reports, studies, agreements, presentations and other written materials.
7. Representing the District effectively in dealings with carriers, vendors and plan administrators on a variety of benefits issues and employee situations.
8. Handling sensitive employee situations with compassion, tact and confidentiality.
9. Making calculations and tabulations and accurately processing and reviewing fiscal and claims-related documents.
10. Tracking statistical information utilizing complex spreadsheets and databases.
11. Communicating clearly and effectively, both orally and in writing.
12. Preparing clear, concise and accurate reports, documents, data entries, and other written materials.
13. Operating a computer and other standard office equipment and using spreadsheet, word processing and enterprise software.
14. Organizing and maintaining specialized files.
15. Maintaining confidentiality of files and records.
16. Maintaining sensitivity to and understanding of the diverse academic, socioeconomic, age, cultural, physical or mental disability, medical condition, gender, gender expression, gender identity, sex, sexual orientation, nationality, race and ethnic backgrounds of community college students, faculty, and staff.
17. Exercising tact and diplomacy in dealing with sensitive, complex and confidential issues and situations.
18. Establishing and maintaining effective working relationships with those encountered in the course of work.

WORKING CONDITIONS.

Environmental Conditions: The employee works under typical office conditions, and the noise level is usually quiet to moderate.

Physical Conditions: Essential and marginal functions may require physical fitness requirements necessary to perform the job functions with or without accommodation, such as the ability to sit for prolonged periods and to use hands to repetitively finger, handle and feel computers and standard business equipment.

TERMS OF EMPLOYMENT.

The duration of any fully restricted funded position in this classification is dependent upon the continuation of funding.