



Tolleson Union High School District #214
Benefits Specialist

Purpose

The job of the Benefits Specialist is to maintain information and administers all Employee Benefits Programs including but not limited to health insurance, medical claims, flexible spending accounts, and COBRA. The incumbent is responsible for presenting information to all active and retired District employees; investigation of and resolving problems between employees and insurance carriers and/or workers compensation carriers; conducting group and individual benefit orientation meetings.

Qualifications

Required:

1. High School Diploma or General Educational Diploma (G.E.D.), required.
2. Minimum of two years benefits experience required in insurance industry, employee benefits or fundamental knowledge of applicable Federal and State insurance laws, worker's compensation, and personnel policies.
3. Experience with Visions Enterprise Software Data Management or similar related software.
4. Valid AZ Department of Public Safety (DPS) Identity Verified Print (IVP) Fingerprint Clearance Card.
5. Knowledge of community resources and appropriate referral practices.
6. Knowledge of and sensitivity to ethnic, cultural, and socioeconomic influences on the employees.
7. Ability to independently prepare reports and correspondence.

Preferred:

1. Associate of Arts degree or higher education degree.
2. Bilingual in English and Spanish.

Essential Functions

1. Administers District insurance benefit plans by determining eligibility and/or contribution level for employees and dependents; entering data in appropriate locations; processing claims and maintaining proper documentation.
2. Assists employees by providing information regarding benefit plans and/or workers compensation benefits, advising them of policies, procedures, and applicable federal, state, and local laws.
3. Discusses financial options with employees on leave and makes payment arrangements.
4. Ensures data reporting to COBRA administrator for employees who are eligible for COBRA.

5. Acts as liaison between employees and program vendors, financial institutions, and governmental agencies.
6. Provides updated information on benefit and/or policy changes to employees.
7. Processes PAF forms and enters all benefit data into Visions.
8. Processes benefit enrollment, change and cancellation forms to ensure proper deductions and maintaining accurate information.
9. Processes benefit calculations for payroll to ensure proper deductions are subtracted.
10. Prepares and maintains employee medical files for all employees.
11. Ensures that documentation of immunity is collected and maintained from all new employees.
12. Coordinates and schedules open enrollment preparation between the District and benefit providers; coordinates benefit fairs, distributes benefits information.
13. Conducts or assists in conducting annual open enrollment meetings and periodic small group benefit meetings for new hires.
14. Maintains inventory of informational materials regarding benefits available to District employees and/or retirees, including provider directories and enrollment forms.
15. Processes all billing; balances monthly statements using accurate participation counts; performs reconciliation of billings.
16. Submits necessary census data to firms providing benefit services.
17. Processes and tracks all District retirees with the Arizona State Retirement System for monthly insurance reimbursements provided to the District.
18. Prepares all required Federal and State reports (i.e., OSHA report); ensuring that all laws and regulations are followed.
19. Under the supervision of the Director of Human Resources, acts as HIPPA privacy officer; ensures District compliance with all HIPPA regulations.
20. Assists in recommending changes in benefit policies, office procedures and forms to ensure better facilitation of the enrollment process, provision of services, and overall administration of the benefit plan.
21. Supports administration in the completion of assigned tasks.
22. Participates in technology training or other workshops, meetings and seminars to keep abreast of legal requirements pertaining to benefits, Arizona State Retirement, and HIPPA to ensure continuing professional development and legal compliance.
23. Provides assistance as needed to the Human Resources Department staff including front office coverage in the absence of the receptionist, filing, etc.
24. Cross trains with other members of the Human Resources Department.
25. Provides clerical assistance as needed to include front desk coverage, data entry and filing or other duties as assigned.
26. Collaborates to modify/improve automated and non-automated processes and procedures as required.
27. Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Skills, Knowledge, and Abilities

SKILLS are required to perform multiple tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skill-based competencies required to satisfactorily

perform the functions of the job include: operating standard office equipment including utilizing pertinent software applications; planning and managing projects; and preparing and maintaining accurate records.

KNOWLEDGE is required to perform basic math, including calculations using fractions, percents, and/or ratios; read technical information, compose a variety of documents, and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge-based competencies required to satisfactorily perform the functions of the job include: read a variety of manuals, write documents following prescribed formats; present information to others; ability to maintain confidential materials and information; understand complex, multi-step written and oral instructions; knowledge of Federal and State employment law as it relates to employee benefits; and business telephone etiquette.

ABILITY is required to schedule activities, meetings, and/or events; gather and/or collate data; and use basic, job-related equipment. Flexibility is required to direct others in a wide variety of circumstances; work with data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a diversity of individuals and/or groups; work with similar types of data; and utilize job-related equipment. Problem solving is required to identify issues and create action plans. Problem solving with data requires independent interpretation of guidelines; and problem solving with equipment is moderate. Specific ability-based competencies required to satisfactorily perform the functions of the job include: communicating with diverse groups; maintaining confidentiality; meeting deadlines and schedules; working with frequent interruptions; setting priorities; and establishing and maintaining effective working relationships.

Responsibility

Responsibilities include: working as a specialist using standardized practices and/or methods; leading, guiding, and/or coordinating others; tracking budget expenditures. Utilization of some resources from other work units is often required to perform the job's functions. There is a continual opportunity to have some impact on the organization's services.

Working Environment

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally, the job requires 80% sitting, 10% walking, and 10% standing. The job is performed under conditions with some exposure to risk of injury and/or illness. The employee will regularly work indoors. The noise level in the work environment is moderate. Travel between District campuses and to locations outside the District is required.

Reports to: Benefits Manager

Term of Employment: Twelve months, full-time

Evaluation: This position will be evaluated annually as outlined in Governing Board Policy Manual.

FLSA Status: Non-Exempt

Salary Range: Support Staff, Initial Placement Salary Schedule, Grade 24

Board Approved: 6/26/2007, 6/16/2010, 10/27/2010, 1/23/2024, 2/24/2026 (Revised)