

**MURRIETA VALLEY UNIFIED SCHOOL DISTRICT
JOB DESCRIPTION**

TITLE: BENEFITS ANALYST

JOB GOAL: Under the direction of the Director of Risk Management, or designee, develops and coordinates the Murrieta Valley Unified School District's benefits program with an emphasis on Health & Welfare Benefits (medical, dental, vision, life). Performs a variety of specialized duties in support of the District health insurance programs for employees and retirees; provide a variety of technical and complex information and assistance to District personnel, covered individuals, medical and legal professionals, and insurance vendors regarding benefit programs; fulfill reporting and notification requirements of applicable government rules and regulations. This position confers with management in negotiations and disseminates pertinent, confidential information that pertains to the bargaining process.

QUALIFICATIONS

Knowledge of:

1. Applicable sections of State Education Code and related legislation.
2. Employee benefit packages and insurance programs.
3. Methods and procedures related to coverages and exclusions of all assigned employee benefit plans.
4. Methods, practices, terminology, and procedures used in benefits administration.
5. Federal and state laws, District rules, policies, and regulations related to employee benefit programs, including, but not limited to: COBRA, HIPAA, and IRC 125, as well as industry trends and updates to District labor union agreement.
6. Principles of exceptional customer service, interpersonal skills using tact, patience, and courtesy.
7. Record-keeping, information and data management.
8. Methods of auditing insurance billings.
9. Standard office computer software with advanced knowledge of Microsoft Excel and Word.
10. Modern office practices, procedures, and equipment.
11. Correct oral and written English usage, spelling, grammar and punctuation, proper telephone techniques and etiquette.
12. Research and analysis methods, including internet searches and government code review and interpretation.
13. Safety rules and regulations for this position and general District safety rules.

Ability to:

1. Administer and coordinate the fringe benefit programs for classified and certificated employees and retirees according to District policies and procedures and contract rules.
2. Prepare COBRA, HIPAA, Affordable Care Act (ACA), JPA and legal documents in accordance with current regulations.
3. Read, understand, and explain District policies, procedures, and insurance plans and coverage to new and existing employees.

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Ability to (continued):

4. Perform a variety of technical duties in support of employee benefits programs including enrollment, data collection, record-keeping, accounting, claims processing and fund disbursement activities.
5. Serve as a technical resource to Human Resources concerning employee benefits information, insurance plans, options, guidelines, and procedures.
6. Process, evaluate and assist employees with the completion of enrollment forms.
7. Troubleshoot and resolve employee issues and concerns regarding benefits.
8. Service as a liaison between Human Resources, insurance brokers and benefit plan administrators.
9. Prepare and maintain permanent employee benefits records and files.
10. Update records with changes in employment status.
11. Interpret, apply, and explain rules, regulation, policies and procedures.
12. Interpret complex laws and policies and apply that knowledge to internal procedures.
13. Arrange and conduct enrollment interviews, presentations, and orientations.
14. Maintain current knowledge of applicable laws, codes, rules and regulations.
15. Establish and maintain a variety of complex record-keeping systems and prepare a variety of financial and statistical reports related to insurance benefits.
16. Analyze situations accurately and adopt an effective course of action without immediate supervision.
17. Meet schedules and timelines.
18. Work efficiently with frequent interruptions while maintaining high standards of workmanship.
19. Communicate calmly and diplomatically with people in emotionally charged circumstances.
20. Communicate effectively in both oral and written forms.
21. Establish and maintain effective working relationships with others.
22. Follow designated safety regulations associated with this position.
23. Interact with employees, coworkers, students, and the public with tact, patience, and courtesy, while maintaining strict confidentiality of sensitive and protected information.
24. Operate a variety of office equipment such as calculator, copy machine, computer terminal, printer, etc. with speed and accuracy.
25. Perform a variety of responsible clerical work, mathematical calculation of more than average difficulty, involving use of independent judgment and requiring accuracy and speed.
26. Present and maintain a pleasant appearance and demeanor.
27. Apply knowledge of computer software programs including, but not limited to, word processing and spreadsheets.
28. Work independently with little supervision.
29. Work confidentially with discretion.
30. Work successfully with diverse groups of people.

Education and Experience:

1. Three (3) years of experience working with employee benefits programs and/or lines of insurance.
2. Related experience in a public-school district setting is desirable.
3. An advanced knowledge of word processing, spreadsheet, and related software programs.

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Education and Experience (continued)

4. A work history demonstrating dependability and reliability.
5. Bachelor's degree from an accredited university preferred.

REPORTS TO: Director of Risk Management or designee

ESSENTIAL FUNCTIONS

1. Administers the day-to-day operations of the department in support of the fringe benefit program for classified and certificated employees and retirees in accordance with District policies and procedures; enrolls and processes District personnel in applicable insurance plans, including but not limited to, life, health, medical, dental and vision insurance; serves as primary contact for employees and third-party administrators; investigates discrepancies and provides information.
2. Develops and utilizes fiscal control templates to communicate employee voluntary payroll deductions; determines retiree share costs utilizing established factors and criteria; processes refund requests and requisitions as required.
3. Conducts new hire orientations for District employees; explains plan designs, cost factors, eligibility rules, insurance carriers, plan rates, plan years, plan availabilities, deductions, required documentation and other factors related to benefits plans and characteristics.
4. Updates and maintains websites as assigned by the position; oversees preparation and distribution of information to inform employees of benefit changes and options; creates information flyers to clarify complex data; oversees the design and development of tools to assist employees in benefits selection and to guide managers through the benefit impact of personnel decisions.
5. Reviews and implements benefits program functions; performs plan audits; identifies and defines eligibility, mandated reporting and new legislation concerns and issues; identifies areas for improvement; maintains related documentation.
6. Coordinates the fringe benefit program for classified and certificated employees and retirees in accordance with District policies and procedures; enrolls and processes District personnel in applicable insurance plans including life, health, medical, dental and vision.
7. Troubleshoots and resolves employee issues and concerns regarding benefits; researches information as necessary; prepares and distributes correspondence to employees, retirees and plan participants concerning employee benefit plans, policies, procedures and related information; provides employees with related informational materials; refers staff to outside resources as appropriate.
8. Inputs employee benefits and a variety of other data into an assigned computer system; maintains automated employee records and files; generates computerized reports as requested; assures accuracy of input and output data.

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ESSENTIAL FUNCTIONS (continued)

9. Serves as a technical resource to personnel concerning employee benefits information, insurance plans, enrollment options, eligibility, coverage and claims; responds to inquiries, resolves issues and conflicts and provides technical information concerning related policies, procedures, guidelines, rules and regulations; conducts workshops and meetings as required.
10. Compiles information and prepares and maintains a variety of records and reports related to employee information, benefits, rates, retirements, terminations, insurance plans, contracts, payments, and other assigned duties; establishes and maintains filing systems.
11. Develops and implements systems to prepare, maintain and process a variety of documents including enrollment, appointment and change of status documents; assures compliance with applicable laws, contracts, rules and regulations.
12. Develops and implements a full cycle COBRA process to include accounts receivables for premiums.
13. Reviews current literature and remains up to date on developments related to benefits, insurance and laws; serves on committees and attends meetings and seminars.
14. Gathers and compiles information used to plan and determine benefit options for District employees in various bargaining units and labor groups through insurance committees.
15. Communicates with personnel, insurance providers, brokers and various other outside agencies to exchange information, coordinates activities and resolves issues or concerns.
16. Operates a variety of office equipment including a calculator, copier, fax machine, computer and assigned software.
17. Orders, receives and maintains inventory of benefits materials.
18. Attends various assigned meetings and conferences.
19. Plans and organizes events including Open Enrollment, benefit information meetings and other events; distributes information regarding health insurance; establishes timelines and schedules.
20. Communicates effectively in both oral and written forms.
21. Computes, verifies, balances, and adjusts accounts, records and data requiring independent judgment based on established procedures and policies.
22. Interacts effectively with medical, legal, public safety, government, and insurance professionals.
23. Knows and understands the Mission and Core Values of the District.
24. Meets and deals effectively with staff, applicants, and the public in a constructive, objective, efficient, and professional manner.
25. Participates in new/current employee orientations according to established procedures, policies, and federal and state laws; provides a variety of information to employees, retirees, and dependents regarding eligibility, available insurance and benefits options, contract requirements, and policies and procedures.

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ESSENTIAL FUNCTIONS (continued)

26. Prepares and balances monthly billings for carriers including medical, life, vision, and dental agencies as assigned, and requests warrants for payment.
27. Prepares, maintains, and processes a variety of documents including insurance enrollment materials, insurance claims and/or government compliance issues, and change of personal information forms.
28. Processes forms, applications, documents, records and/or other paperwork in support of assigned office functions.
29. Provides appropriate letters to eligible employees or dependents experiencing a loss of benefits; maintains related records.
30. Provides a high standard of customer service to staff and community members in the performance of job-related duties.
31. Serves on committees and attends meetings as assigned.
32. Reviews Board actions and record changes related to employee benefits, reviews entitlement changes and premiums.
33. Tracks retirees and prepares correspondence regarding termination of District-paid benefits and provides information regarding eligibility for retiree benefits.

This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.

OTHER FUNCTIONS

1. Performs other related duties as assigned.

PHYSICAL ABILITIES

1. Visual ability to read handwritten or typed documents and the display screen of various office equipment and machines.
2. Able to conduct verbal conversation in English or other designated language.
3. Able to hear normal range verbal conversation (approximately 60 decibels.)
4. Able to sit, stand, stoop, kneel, bend, and walk.
5. Able to sit for sustained periods of time.
6. Able to climb slopes, stairs, steps, ramps, and ladders.
7. Able to lift up to ten (10) pounds frequently, and thirty (30) pounds occasionally.
8. Able to carry up to ten (10) pounds frequently, and thirty (30) pounds occasionally.
9. Able to push and pull objects weighing up to thirty (30) pounds.
10. Able to exhibit full range of motion for shoulder external rotation and internal rotation.
11. Able to exhibit full range of motion for shoulder abduction and adduction.
12. Able to exhibit full range of motion for elbow flexion and extension.
13. Able to exhibit full range of motion for shoulder extension and flexion.
14. Able to exhibit full range of motion for back lateral flexion.
15. Able to exhibit full range of motion for hip flexion and extension.
16. Able to exhibit full range of motion for knee flexion.
17. Able to demonstrate manual dexterity necessary to operate calculator, typewriter, and/or computer keyboard at the required speed and accuracy in a safe and effective manner.
18. Able to operate a motor vehicle in a safe and effective manner.

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PHYSICAL ABILITIES (continued)

While the ideal candidate will possess all these abilities, duties assigned can be modified to reasonably accommodate some physical restrictions.

SPECIAL REQUIREMENTS

1. Must use safety equipment and devices designated for this position.
2. Possession and maintenance of a valid and appropriate state of California driver's license; have an acceptable driving record, and be insurable at standard rates by District's insurance carrier and maintain such insurability during the course of employment.

TERMS OF EMPLOYMENT: Twelve-month work year
Classified Confidential

EVALUATION: Performance of this job will be evaluated in accordance with Board of Education policy. The Director of Risk Management or designee will give the evaluation.

Approved by: Board of Education Date: December 14, 2021

Murrieta Valley Unified School District is a drug-free & tobacco-free workplace and equal opportunity employer.

The District does not discriminate against employees or job applicants on the basis of gender, race, color, religious creed, national origin, ancestry, age of 40, marital status, physical or mental disability, or Vietnam Era veteran status. Equal opportunity shall be provided to all employees and applicants in every aspect of personnel policy and practice. The District does not discriminate against person with disabilities who, with reasonable accommodation, can perform the essential functions of the job in question.