

**MURRIETA VALLEY UNIFIED SCHOOL DISTRICT
JOB DESCRIPTION**

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TITLE: RISK MANAGEMENT SPECIALIST

JOB GOAL: Under the direction of the Risk Manager, to coordinate and provide a variety of technical and complex information and assistance to district personnel, medical and legal professionals and insurance vendors regarding insurance and safety programs. To contribute to the efficient operation of the Risk Management Department by providing insurance benefit information to employees and retirees; providing a variety of information and assistance to District personnel, covered individuals, and insurance vendors regarding the District's benefit programs; and auditing/reconciling and ordering payment for the District's insurance benefit plans.

QUALIFICATIONS

Knowledge of:

1. Applicable sections of State Education Code and related legislation.
2. Budget monitoring techniques.
3. Business math, ledger, and record keeping procedures related to the auditing and reconciliation of employee insurance benefit billings.
4. Federal and state laws, and District rules, policies, and regulations related to employee benefit programs, including, but not limited to: COBRA, HIPAA, and IRC 125, as well as employee and public safety, including but not limited to Cal-OSHA, Cal-EPA, and Labor Code.
5. Interpersonal skills using tact, patience, and courtesy.
6. Mathematical (algebraic) principles used in data analysis.
7. Methods and procedures related to coverages and exclusions of all assigned employee benefit plans.
8. Methods of auditing insurance billings.
9. Modern office methods and procedures, including correct oral and written English usage, spelling, grammar, and punctuation, proper telephone techniques and etiquette.
10. Modern office practices, procedures and equipment.
11. Operation of a computer terminal and data entry techniques.
12. Policies and objectives of assigned program and activities.
13. Principles of exceptional customer service.
14. Record-keeping, information, and data management.
15. Research and analysis methods, including internet searches and government code review and interpretation.
16. Safety rules and regulations for this position and general District safety rules.
17. Advanced knowledge of computer software, especially Microsoft Access, Excel, and Word.
18. Workers compensation reporting timeline requirements.

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Ability to:

1. Assist the Risk Management Analyst with fringe benefit programs for classified and certificated employees and retirees according to district policies and procedures and contract rules, and District property/liability insurance programs.
2. Assist the Risk Management Analyst with Workers Compensation, training compliance, student injury reports, and other.
3. Analyze situations accurately and adopt an effective course of action without immediate supervision.
4. Be a productive and active team member.
5. Communicate calmly and diplomatically with people in emotionally charged circumstances.
6. Communicate effectively in both oral and written forms.
7. Compile and maintain insurance benefit accounts in an accurate and complete manner.
8. Participate in new and current employee orientations by preparing and delivering effective presentations related to department functions.
9. Establish and maintain a variety of complex record-keeping systems and prepare a variety of financial and statistical reports related to insurance benefits and other assigned areas in Risk Management.
10. Establish and maintain effective working relationships with others.
11. Follow designated safety regulations associated with this position.
12. Interact with employees, coworkers, students, and the public with tact, patience, and courtesy, while maintaining strict confidentiality of sensitive and protected information.
13. Independently make scheduled and unscheduled reports and keep detailed records.
14. Interpret complex laws and policies and apply that knowledge to internal procedures.
15. Interpret, apply and explain rules, regulations, policies and procedures.
16. Learn and follow the operations, procedures, policies, and requirements for the Risk Management department. Understand established departmental goals and objectives, and work to ensure their fulfillment.
17. Maintain complex records and prepare reports.
18. Make mathematical calculations with speed and accuracy.
19. Meet schedules and timelines.
20. Observe legal and defensive driving practices.
21. Operate a variety of office equipment such as calculator, copy machine, computer terminal, printer, etc. with speed and accuracy.
22. Perform a variety of responsible clerical work of more than average difficulty, involving use of independent judgment and requiring accuracy and speed.
23. Prepare COBRA, HIPAA, Cal-OSHA, JPA and legal documents in accordance with current regulations.
24. Present and maintain a pleasant appearance and demeanor.
25. Prioritize and coordinate workflow in a timely manner.
26. Provide a variety of information and assistance to employees regarding insurance benefit programs, claims processing, unpaid claims, Workers Compensation benefits and to the public regarding property/liability issues.
27. Read, understand, and explain District policies and procedures and insurance plans and coverage to new and existing employees.
28. Read, write, and comprehend the English language at the level required for successful performance of assigned duties.
29. Receive and give information over the telephone or in person in a courteous manner.

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Ability to (continued)

30. Skillfully operate computer terminals, microcomputers, and other business equipment.
31. Speak effectively in front of groups.
32. Type accurately at a rate of (40) words per minute.
33. Understand and carry out oral and written instructions.
34. Apply knowledge of computer software programs including, but not limited to, word processing and spreadsheets.
35. Work efficiently with frequent interruptions while maintaining high standards of workmanship.
36. Work independently with little supervision.
37. Work confidentially with discretion.
38. Work successfully with diverse groups of people.

Education and Experience:

1. Equivalent to completion of twelfth (12th) grade supplemented by courses in accounting, insurance or related fields and three (3) years of increasingly responsible experience, preferably in a legal or insurance related field involved with the public and heavy computer use.
2. Related experience in a public school setting is desirable. Willingness to acquire other credentials as required.
3. A working knowledge of word processing, spreadsheet, and related software programs.
4. A work history demonstrating dependability and reliability.

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 the District's insurance carrier and maintain such insurability during the course of employment.

REPORTS TO: Director of Risk Management or designee

ESSENTIAL FUNCTIONS

1. Performs a variety of technical duties in support of the District's Risk Management programs including Workers Compensation, safety, and environmental health/hazards.
2. Assists the Benefits Analyst with employee health and welfare insurance benefits.
3. Assist the Risk Management Analyst with Workers Compensation, training compliance, student injury reports, and other.
4. Assists employees and retirees with health and welfare insurance enrollment.
5. Compiles data, audits retiree and cobra payments and reports for Fiscal Services.
6. Assists with and provide new hire orientations.
7. Checks, verifies, sorts, tabulates, and files a variety of data and information according to predetermined classifications; maintaining alphabetical, numerical, index, and cross-referencing files.

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ESSENTIAL FUNCTIONS (continued)

8. Communicates effectively in both oral and written forms.
9. Communicates with District employees, retirees, and outside agencies to provide information and clarification regarding benefit coverages, pending/denied claims, and other employee benefit matters.
10. Communicates with District departments and personnel, insurance companies, and medical personnel regarding employee Workers Compensation and insurance benefits.
11. Composes and types correspondence and responds to a variety of questions regarding Workers Compensation, safety, general liability, government compliance, and emergency preparedness.
12. Computes, verifies, balances and adjusts accounts, records and data requiring independent judgment based on established procedures and policies.
13. Conducts open enrollment processes.
14. Ensures employees are provided timely and effective assistance by maintaining a variety of record-keeping systems, monitoring dates to assure required actions are consistent with timelines.
15. Interacts effectively with medical, legal, public safety, government, and insurance professionals.
16. Knows and understands the Mission and Core Values of the District.
17. Meets and deals effectively with staff, applicants, and the public in a constructive, objective, efficient, and professional manner.
18. Opens and maintains complete and accurate files and records, including claims files on work-related injury cases, property/liability claims and subrogation and expedites the completion of matters in the process relating to Workers Compensation/property/liability claims.
19. Operates a variety of office machines including copier, computer, typewriter, calculator, and computer terminal as well as occupational and public safety testing equipment.
20. Orders and maintains a supply of informational benefit materials.
21. Participates in District in-service training/new hire orientations as required.
22. 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.
23. Performs a variety of complex clerical work, including typing, proofreading, filing, and record verification and provide clerical support to the department's Director.
24. Assists with the preparation and balances monthly billings for carriers including voluntary plans, medical, life, vision, and dental agencies as assigned; and requests warrants for payment.
25. 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.
26. Processes forms, applications, documents, records and/or other paperwork in support of assigned office functions.
27. Provides appropriate letters to eligible employees or dependents experiencing a loss of benefits; maintains related records.
28. Provides a high standard of customer service to staff and community members in the performance of job-related duties.

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ESSENTIAL FUNCTIONS (continued)

29. Remains current on developments related to benefits, insurance related laws, safety, insurance, emergency preparedness and various laws, including but not limited to Cal-OSHA, Cal-EPA, and Labor Code.
30. Serves on committees and attends meetings as assigned.
31. Reviews Board actions and records changes related to employee benefits, Workers Compensation, property/liability, reviews entitlement changes and premiums.
32. Tracks retirees and prepares correspondence regarding termination of District-paid benefits and provides information regarding eligibility for retiree benefits.
33. Assists with the work of Return-to-Work program participants; maintain Return-to-Work Program process.

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.

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

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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
Bargaining unit employee

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

Approved by:	Board of Education	Date:	February 20, 2003
Amended by:	Board of Education	Date:	December 9, 2010
Amended 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.