

MODESTO CITY SCHOOLS

JOB DESCRIPTION

INSURANCE SPECIALIST

DEFINITION:

Under the direction of the Director of Risk Management, perform a variety of technical duties in support of the District's insurance programs and activities such as reconciliation, balancing and processing of payments, billing and maintenance of employee benefits and records; monitor and maintain reports and records for Account Balancing, Monthly Costs, and Medical Insurance recipients; perform related clerical, accounting and record-keeping duties.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Perform a variety of technical duties in support of the District's insurance programs and activities including processing of payments; reconcile, balance and process payments of financial statements and billings for various insurance vendors; maintain, monitor and update database of current and retired employees; create Discrepancy, Account Balancing and Monthly Cost reports.
- Process and assist personnel with completing a variety of forms and applications related to insurance; compile information and signatures as necessary; collect and process monthly premium payments and mail monthly statements; process check requests and track employer share of cost and administrative fees; compose a variety of correspondence;
- Monitor monthly insurance claims, invoices and requests for insurance payments; log and track received check payments for current, retired employees and COBRA members; process check requests; collect and process checks received from employees; ensure timely deposits; audit and update data from payroll and Human Resources.
- Contact new hires regarding benefit enrollment; schedule new hire benefits appointment; prepare state and federal insurance mandate letters for orientation; update address change with carriers.
- Perform various accounting duties related to assigned programs; audit and balance accounts for medical, vision, dental and retiree trust funds; calculate, monitor and ensure accuracy of various fees including payables, medical payments, premiums and payroll docks as required; process invoices and prepare related paperwork; balance, review and manage assigned accounts.
- Meet with active employees, retirees making insurance plan changes, answer questions and assist with enrollment documents; process expenditure transfers, requisitions and revolving cash check requests as needed; assist employees during open enrollment period.
- Prepare and maintain a variety of logs, records and files related to insurance claims, and assigned activities; prepare and submit reports as required by State and federal agencies.
- Confer with insurance providers, state CalPERS and CAL STRS representatives as needed.
- Communicate with other departments, administrators, personnel and various outside agencies to exchange information, coordinate activities and resolve issues or concerns; provide detailed and technical information concerning policies and procedures where judgment, knowledge and interpretation of procedures and regulations are required.
- Operate a variety of standard office equipment including a computer and assigned software.
- Input data and information into an assigned computer system; generate a variety of mandated and requested computerized reports; maintain automated records; ensure accuracy of input and output information.
- Participate in Open Enrollment events; attend a variety of assigned meetings and conferences, including Health Fairs.

OTHER DUTIES:

- Perform related duties as assigned.

REQUIRED QUALIFICATIONS:

Education and Experience:

- Any combination equivalent to: graduation from high school supplemented by college-level course work in human resources, accounting , business or related field and three years clerical, accounting, bookkeeping or secretarial experience performing complex work tasks.

Licenses and other Requirements

- Valid California Class C driver's license.
- Must provide a DMV printout within five work days of offer of employment.
- Maintain participation in CA DMV Assessment System/Automatic Pull Program.
- Typing certificate evidencing an ability to keyboard at a net rate of 40 words per minute.

DESIRABLE QUALIFICATIONS:

- Two years college course work or training in secretarial, clerical, bookkeeping, accounting, or general office procedures skills, including computer data entry.

Knowledge of:

- Summary plan descriptions, vendor contracts, insurance codes, policies, procedures and forms.
- Organizational policies, rules and regulations related to risk management and insurance functions.
- Rules and regulations of FMLA, COBRA and State requirements.
- Accounting practices and procedures.
- Interpersonal skills including tact, patience and courtesy.
- Record-keeping and filing techniques.
- Research methods and report writing techniques.
- Operation of a variety of standard office equipment including a computer and assigned software.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Oral and written communication skills.
- Modern office practices, procedures and equipment.
- Mathematical computations.

Ability to:

- Perform a variety of technical duties in support of insurance programs.
- Process and assist personnel with completing a variety of forms and applications related to insurance.
- Perform various accounting duties related to assigned programs.
- Interpret, apply and explain rules, regulations, policies and procedures concerning insurance.
- Perform clerical duties related to assigned activities.
- Compile and verify data and prepare reports.
- Maintain records and files.
- Maintain confidentiality of sensitive information.
- Meet schedules and time lines.
- Understand and follow oral and written instructions.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Type or input data at an acceptable rate of speed.
- Determine appropriate action within clearly defined guidelines.
- Add, subtract, multiply and divide quickly and accurately.

WORKING CONDITIONS:

Work Environment:

- Office environment.
- Constant interruptions.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Dexterity of hands and fingers to operate a computer keyboard.
- Seeing to read a variety of materials.
- Hearing and speaking to exchange information.
- Bending at the waist, kneeling or crouching to file materials.
- Sitting for extended periods of time.

Hazards:

- Potential for contact with dissatisfied or abusive individuals.

The information contained in this job description is for compliance with the Americans with Disabilities Act (A.D.A.) and is not an exhaustive list of the duties performed.

Cabinet Approved: 2/28/2007

Unit Approved: 6/12/2007

Board Approved: 7/16/2007

FLSA Status: Non Exempt