

## **TORRANCE UNIFIED SCHOOL DISTRICT**

### **CLASS TITLE: BENEFITS SPECIALIST**

#### **BASIC FUNCTION:**

Under the direction of Human Resources Analyst and Director-Employee Resources, perform a variety of technical accounting and complex administrative duties related to the preparation, maintenance and audit of financial records and accounts within a specialized area of the processing of District benefit and insurance programs including health, dental and vision; assist employees, retirees and insurance carriers regarding employee health, dental and vision benefits; assist in the coordination of the annual open enrollment; maintain records and inventory of benefit materials and literature for distribution to employees.

#### **REPRESENTATIVE DUTIES:**

Perform a variety of independent administrative duties related to the implementation of district health and welfare package and insurance programs; explain benefit options available; enrollment issues, and eligibility requirements to all employees, including new hires, returning employees, LOA's, COBRA, and retirees during the school year; ensures that HIPAA, TEFRA, and MEDICARE policies, regulations, notification requirements, and timelines are adhered to. *E*

Assist in the coordination of the annual open enrollment including preparation of materials to all classifications of employees, including actives, retirees, LOA's and COBRA participants, distributing material and receiving applications for changes; enrolls, and deletes employees from benefit plans when eligibility changes; collects all consent material relating to personnel actions for covered employees; notified employees of eligibility changes; prepares change records and distributes to employees. *E*

Gather, assemble, post, balance and summarize accounting data; receipt and deposit monies as assigned. *E*

Maintain inventory of benefit material and literature and distribute to employees as requested. Coordinate ordering of materials for open enrollment or as required. *E*

Maintain IRC Section 125 program and 403(b) program with respect to eligibility, enrollments, and deletions; monitor TSA enrollments to assure maximum contributions are not exceeded; ensure IRC Section 125 403(b) policies and regulations are adhered to. *E*

Contacts insurance carriers regarding employee claims; coordinates the employee eligibility, and payment computation for employee benefit and insurance programs with the payroll department. *E*

Obtain informational materials, coordinate mailings and provide information material to employees upon request; create and maintain the controlling spreadsheet for all enrollment transactions and the deduction register change list; audit billings and financial data to ensure accuracy when reconciling payments; assist in the preparation and gathering of information in connection with benefit costs. *E*

Assist in benefit costs for use in budgeting. *E*

Communicate with vendors, and District personnel to resolve problems, correct errors, obtain authorizations and exchange information. *E*

Audit financial data and documents to assure accuracy, completeness and compliance with District policies and procedures and applicable governmental regulations. *E*

Coordinate with Los Angeles County Office of Education (LACOE) in preparation and maintenance of benefit records. *E*

Perform related duties as assigned.

**KNOWLEDGE AND ABILITIES:**

KNOWLEDGE OF:

Accounting and auditing principles, practices and procedures.  
Financial, statistical and fiscal record-keeping principles.  
Preparation of comprehensive accounting reports.  
Modern office practices, procedures and equipment.  
Applicable sections of State Education code and other applicable laws.  
Interpersonal skills using tact, patience and courtesy.  
Operation of a computer work station.  
Technical aspects of field of specialty.  
District organization, operations, policies and objectives.  
Oral and written communication skills.  
Correct English usage, grammar, spelling, punctuation and vocabulary.

ABILITY TO:

Maintain and audit fiscal records and accounts.  
Perform technical and complex accounting work in the preparation, maintenance and review of financial records, accounts and reports for an assigned department.  
Assure compliance with applicable District policies, procedures and governmental regulations.  
Comprehend and explain each of the Bargaining Unit's contract provisions, rules, regulations and policies as they pertain to employee salaries.  
Prepare financial records, reports and statements.  
Interpret and apply rules, regulations, policies and procedures.  
Operate a variety of office equipment and machines such as typewriter, calculator, copier and computer.  
Establish and maintain cooperative and effective working relationships with others.  
Analyze situations accurately and adopt an effective course of action.  
Meet schedules and time lines.  
Communicate effectively both orally and in writing.  
Work independently with little direction.  
Plan and organize work.

**EDUCATION AND EXPERIENCE:**

Any combination equivalent to: two years of college-level training with specialized course work in accounting, bookkeeping or related field and three years increasingly responsible experience in the preparation and maintenance of financial and statistical records or the maintenance of employee health benefit programs in an automated accounting environment.

**WORKING CONDITIONS:**

ENVIRONMENT:

Office environment.

PHYSICAL ABILITIES:

Bending, pushing, moving, and lifting objects weighing up to 25 pounds. Dexterity of hands and fingers to operate office equipment, seeing to read, post and assure the accuracy of financial records and documents, and hearing and speaking to exchange information.