



Benefits Specialist

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OVERVIEW

Under direction of the Manager of Payroll and Benefits, the Benefits Specialist performs a variety of routine and non-routine clerical/accounting functions in accordance with standard procedures in general accounting and Benefits administration. The position functions as a part of the Payroll and Benefits Section of the Financial Services Department by administering benefits plans for all employee groups. The position ensures correct deductions are taken in accordance with carrier policy, collective agreements and employee contracts. The Benefits Specialist assists employees in completing benefits applications and claims while ensuring applications are complete and meet eligibility requirements. The position functions as the District's primary contact with carriers to ensure correct employee coverage and ensures taxable benefits are correctly reported for income tax reporting.

POSITION DESCRIPTION BENEFITS SPECIALIST

BS - 1

Fulfills the District's operational responsibility for benefits administration by:

- receiving, verifying, processing and distributing all teaching and non teaching benefits information;
- maintaining records and completing carrier forms for all teaching and non-teaching benefits including Medical Services Plan, extended health, dental, group life and disability plans;
- preparing benefit information sheets and distributing benefits packages for all employee groups
- preparing payment for self administered life insurance benefit plans;
- reviewing applications for accuracy, eligibility and completeness before entering into carrier benefit systems;
- preparing billings for benefits premiums for all employees on leaves of absence to ensure payments are received by the District;
- answering, researching and problem solving inquiries relating to benefit plans, sick time and any benefits related issues;
- working empathetically with clients who may be under

considerable emotional stress when making claims under life and disability plans or are invoiced for benefits to be paid while on unpaid medical leave;

- preparing and calculating data for computer input involving additions, changes or adjustments to employee benefits deductions and account codes;
- preparing, maintaining and filing a variety of records and reports;
- preparing a variety of correspondence relating to employee benefits, carrier adjustments, clarification of rates and policies; and,
- ensuring backup and audit trails are maintained.

BS - 2

Ensures benefits records are reviewed and accurate by:

- following up on unpaid billings on a timely basis to ensure the District does not lose money for unpaid benefits;
- ensuring that source information is appropriate, authorized and properly coded to meet collective agreements, legislation, carrier agreements, District policy and accounting requirements;
- reviewing and verifying benefits information;
- ensuring security procedures are followed;
- bringing discrepancies and errors to the attention of the Manager of Payroll and Benefits;
- ensuring accurate and complete supporting documentation for source documents are received, recorded and filed
- exercising due diligence regarding possible misrepresentations and fraud;
- following up on discrepancies and reconciliation issues as identified during the benefits reconciliation process and ensuring appropriate corrective action is taken;
- anticipating and preparing for global rate changes;
- making retroactive adjustments on retroactive rate changes; and,
- ensuring benefits are recorded correctly for accurate taxable benefit calculations.

BS - 3

Contributes to the efficient operation of the Payroll and Benefits Section by:

- providing suggestions for change and assisting with formulation and implementation of office and benefits procedures to improve the overall operations of the Payroll and Benefits Section particularly in relation to benefits administration;
- assisting in the development of the Section's systems and

- procedures to enhance planning and control within the section;
- maintaining a broad and current knowledge of all Payroll functions in order to effectively perform general counter service; and,
- participating in the orientation of new staff.

BS - 4

Performs other assigned comparable or transient duties, which are within the area of knowledge and skills required by this job description

**QUALIFICATIONS FORM
BENEFITS SPECIALIST**

EDUCATION	<p><i>TECHNICAL REQUIREMENTS</i></p> <p>Grade 12 or equivalent, and</p> <p>Completion of the Certified Employee Benefit Specialist program or equivalent</p> <p>OR</p> <p>Completion of level 2 of a designated accounting program (CMA, CA or CGA)</p> <p>OR</p> <p>Completion of the Payroll Compliance Practitioner certification offered by the Canadian Payroll Association</p>
EXPERIENCE	<p><i>TECHNICAL REQUIREMENTS</i></p> <p>Two (2) years of experience in a large automated payroll office</p> <p><i>JOB SPECIFIC REQUIREMENTS</i></p> <p>Proficient with Excel spreadsheets and word processing applications</p> <p>Experience working in a unionized environment</p> <p>Experience working with employee benefits packages</p>

KNOWLEDGE	<p><i>TECHNICAL REQUIREMENTS</i></p> <p>Working knowledge of automated payroll systems and benefits related legislative and accounting related requirements</p> <p><i>JOB SPECIFIC REQUIREMENTS</i></p> <p>Specific knowledge of District Systems and collective agreements</p> <p>Specific knowledge of employee contracts and benefits plans</p>
SKILLS AND ABILITIES	<p><i>INTERPERSONAL REQUIREMENTS</i></p> <p>Ability to work carefully and kindly with clients who may be under considerable emotional stress</p> <p>Ability to build and develop team approaches to problem solving where individual skills and abilities are pooled to address and resolve issues that individuals could not solve on their own</p> <p>Ability to construct thoughts in a logical and convincing fashion and express them in discussion and in writing</p> <p>Effective written and oral communication skills and the ability to request and convey information in a diplomatic manner</p> <p>Ability to work in a confidential working environment</p> <p><i>PROBLEM SOLVING REQUIREMENTS</i></p> <p>Demonstrate motivation and determination in understanding the needs of others while ensuring that legislative, carrier and financial control requirements are also addressed</p> <p>Ability to organize and prioritize high volume of work, often under the pressure of multiple demands, deadlines and interruptions, while maintaining close attention to detail and accuracy</p>

WORKING CONDITIONS	<i>OCCUPATIONAL REQUIREMENTS</i> Sufficient vision and hearing to perform related job duties Able to lift or move up to 18 kgs (40 lbs) and operate related equipment Able to operate related equipment
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