



Benefits Specialist

[Position Description](#) | [Qualifications](#)

OVERVIEW

Under direction of the Manager, 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 staff benefits information;
- maintaining records and completing carrier forms for all teaching and non-teaching staff benefits including extended health, dental, group life and disability plans;
- preparing content for benefit information sheets and web pages and distributing benefits packages for all employee groups
- maintaining and reconciling flex benefit spreadsheets and reporting health spending accounts to HUB preparing payment for self-administered life insurance benefit plans;
- reviewing applications for accuracy, eligibility and completeness before sending to appropriate carriers;
- preparing billings for benefits premiums for all employees on leaves of absence to ensure payments are received by the District;

- monitoring leaves for all employee groups in order to correctly charge employer/employee benefit ratio
- answering, researching and problem solving enquiries 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.
- Scanning and indexing of all employee transactions

BS - 2

Performs pension functions by:

- completing required pension forms for the Municipal and Teacher pension plans;
- processing pensionable service applications, calculating entitlement of purchase; and,
- responding to queries from District staff and the Pension Corporation on employee pension benefits.
- LTD start & stop; rehab earnings
- Weekly pension remittances
- ASA conversion
- Assisting with annual reporting
- Distribution of annual Pension Statements to all employee groups
- Resignation and retirement processing

BS - 3

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;
- setting up PAD agreements, maintaining spreadsheet
- monitoring of leaves
- 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 - 4

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 and training of new staff.

BS - 5

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	TECHNICAL REQUIREMENTS Grade 12 or equivalent and completion of the Payroll Compliance Practitioner Certificate (4 courses up to one year) OR Equivalent combination of education and experience
EXPERIENCE	TECHNICAL REQUIREMENTS Two (2) years of experience in a large automated payroll office JOB SPECIFIC REQUIREMENTS Proficient with Excel spreadsheets and word processing applications Experience working in a unionized environment Experience working with employee benefits packages
KNOWLEDGE	TECHNICAL REQUIREMENTS Working knowledge of automated payroll systems and benefits related legislative and accounting related requirements JOB SPECIFIC REQUIREMENTS Specific knowledge of District Systems and collective agreements Specific knowledge of employee contracts and benefits plans

SKILLS AND

ABILITIES

INTERPERSONAL REQUIREMENTS

Ability to work carefully and kindly with clients who may be under considerable emotional stress. Respond with empathy

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

Ability to construct thoughts in a logical and convincing fashion and express them in discussion and in writing

Effective written and oral communication skills and the ability to request and convey information in a diplomatic manner

Ability to explain complex systems in a thoughtful and considerate fashion to ensure universal understanding

Ability to handle high volumes of work with constantly changing priorities in order to meet reporting deadlines

Ability to work in a confidential working environment

Effective time management skills

Strong interpersonal skills

Strong conflict resolution skills

PROBLEM SOLVING REQUIREMENTS

Demonstrate motivation and determination in understanding the needs of others while ensuring that legislative, carrier and financial control requirements are also addressed

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 High volumes of work where detailed accuracy is very important Able to operate related equipment
-------------------------------	---

Updated April 2021