



Benefits Specialist

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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 purposes.

POSITION DESCRIPTION BENEFITS SPECIALIST

BS - 1

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

- receiving, verifying, processing and distributing all 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 PBC/HUB preparing payment for self-administered 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 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 interfaces involving additions, changes or adjustments to employee benefits deductions and account codes;
- preparing, maintaining and filing a variety of records and reports;
- developing and maintaining benefits communication materials, including guides, FAQs and employee presentations to promote understanding of all benefits available;
- conducting employee information sessions and new hire orientations on benefit programs, health spending accounts, and retirement planning;
- supporting enrollment activities, including employee assistance and data audits for various entities including benefit providers and insurance institutions;
- 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

Performs pension functions by:

- completing required pension forms for the Municipal and Teacher pension plans;
- processing pensionable service applications, calculating entitlement of purchase;
- responding to queries from District staff and the Pension Corporation on employee pension benefits;
- completing weekly pension remittances;
- distributing annual pension statements to all employee groups;
- acting as the District liaison with the pension plan administrations to ensure timely and accurate processing of enrollments, transfers and retirements; and,
- analyzing pension related data and providing reports to management to support workforce planning and forecasting of retirement trends.

BS - 3

Ensures benefits records are reviewed and accurate by:

- following up on unpaid billings on a timely basis to ensure correct deduction and collection of employee and employer ratios;

- ensuring that source information is appropriate, authorized and properly coded to meet collective agreements, legislation, carrier agreements, District policy and accounting requirements;
- setting up PAD agreements, maintaining spreadsheet
- monitoring leaves for the purposes of benefit adjustments;
- 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;
- conducting periodic audits of benefit enrollments, premiums and eligibility to ensure accuracy and prevent overpayments or fraudulent claims;
- preparing various reports for management on benefits utilization, cost trends and participation rates; and,
- assisting with the annual benefits renewal process, including reviewing carrier rate proposals and supporting cost analysis.

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

<p>SKILLS AND ABILITIES</p>	<p><i>INTERPERSONAL REQUIREMENTS</i></p> <p>Ability to respond empathically and kindly to 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 explain complex systems in a thoughtful and considerate fashion to ensure universal understanding</p> <p>Ability to handle high volumes of work with constantly changing priorities in order to meet reporting deadlines</p> <p>Ability to work in a confidential working environment</p> <p>Effective time management skills</p> <p>Strong interpersonal skills</p> <p>Strong conflict resolution skills</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>WORKING CONDITIONS</p>	<p><i>OCCUPATIONAL REQUIREMENTS</i></p> <p>Sufficient vision and hearing to perform related job duties</p> <p>Able to lift or move up to 18 kgs (40 lbs) and operate related equipment</p>

	High volumes of work where detailed accuracy is very important
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Updated: October 2025