EMPLOYEE BENEFIT PROGRAMS ASSOCIATE

DEPARTMENT: **EMPLOYEE HEALTH & BENEFITS** **STATUS:** **NON-EXEMPT**

REPORTS TO: **MANAGER OF EMPLOYEE BENEFIT PROGRAMS**

SUMMARY

The Employee Benefit Programs Associate provides assistance to meet Client needs and resolve difficulties. This position provides Trust administration support to include COBRA administration, PlanSource management, plan document maintenance, and accounts receivable and accounts payable responsibilities.

ESSENTIAL DUTIES & RESPONSIBILITIES

- Act as a resource for internal teams and department, Clients, and Carriers in the following areas:
  - Using existing templates complete configuration documents as directed.
  - Update the employer portal in PlanSource; including look, design, function ability, and plan document uploads as directed.
  - Test the employer portal verifying accuracy of all screens and plan information before release to Client.
  - Provide COBRA administration utilizing the PlanSource system for Client's new hires, qualifying events, and termination.
  - Respond and resolve routine issues the Client may encounter regarding receipt of benefit services and coverage questions.
  - Monitor PlanSource's setup of EDI files.

- Provide day to day Trust administration
  - Provide enrollment materials and member ID's and cards as needed.
  - Process, submit, and follow up on applications to Carriers.
  - Enter Trust documentation into the Agency Management System according to policy and procedures and consistent with MMA professional standards.

- As directed, process the Trust's accounts receivable and accounts payable tasks according to the Accounting department's deadlines.
  - Consolidate invoices ensuring timely billing of each client.
  - Collect all money due to the Trust from each Client; notifying the Employee Benefit Programs Administrator of any missing or late payments.
  - Pull reports from PlanSource to create the monthly Trust detail report.
  - Reconcile invoices and process payments for each vendor/carrier.
  - Identify and allocate member support fees to SSD

EDUCATION AND/OR EXPERIENCE

Successful candidate will be a service oriented individual with high personal standards and a hands-on work style. This position requires an individual who is comfortable working at a varying pace, managing multiple tasks and deadlines simultaneously, adjusting priorities often, and managing frequent interruptions.

This position interacts with and provides service to a large group of internal associates and has high levels of contact with external vendors. The Employee Benefit Programs Associate must be positive and approachable, and work effectively with diverse personalities. In addition, the following is required unless otherwise noted:

- Must possess a strong understanding of health and welfare plan benefits and carriers such that this expertise is recognized by colleagues and clients. This level of expertise is generally acquired through 1-2 years of experience providing group health and benefits sales or service while at a brokerage or carrier.
- Bachelor degree strongly preferred.
- Accounts Payable experience including basic bookkeeping experience a plus but not required.
- Strong communication skills with the ability to provide non-technical explanations to technical matters, and summarize and present information in a clear, concise and accurate written and verbal format.
- Ability to make independent decisions and use good judgment in addressing and servicing client and team needs.
- Prior experience working with carriers' EDI files.
- Maintain a valid unrestricted Life and Disability License in California and meet the continuing education requirements.
- Maintain a valid driver's license and dependable transportation.
- Proficiency with Microsoft Word, Excel and PowerPoint to include work experience creating tables, charts, graphs, pivot tables and formulas.

WORK ENVIRONMENT & PHYSICAL DEMANDS

- Ability to use computer keyboard and sit in a stationary position for extended periods.
- Work is performed in a typical interior/office work environment.
- Travel may be required visiting clients within the San Diego County.
- Extended work hours (10 – 12 hrs/day) required on occasion due to attendance and participation at networking, industry functions and Client meetings that begin well before the workday, and may extend well into the evening.