

ADMINISTRATIVE ASSISTANT

DEPARTMENT: SUPPORT – WALNUT CREEK

STATUS: NON-EXEMPT

REPORTS TO: OPERATIONS SUPERVISOR

SUMMARY

This position is responsible for supporting the Employee Health & Benefits and Business Insurance service teams while managing professional and efficient coordination of phones, visitors, and mail. This role also handles a variety of other clerical duties including, but not limited to, scanning, electronic filing and desktop publishing.

ESSENTIAL DUTIES & RESPONSIBILITIES

- Provide administrative and operational support for the Employee Health & Benefits service team
 - Coordinate and calendar carrier meetings
 - Gather data, update and maintain information within BenefitPoint
 - Create and maintain benefit contacts within BenefitPoint
 - Provide clerical functions to the client service team for marketing/renewal presentations, open enrollment communications and other client presentation materials
 - Provide support for other projects assigned
- Provide administrative and operational support for the Business Insurance service team
 - Download various policy documents from carrier website for Business Insurance department and bring into document management system
 - Identify and scan client policies, endorsements, certificates, and other correspondence into the appropriate agency management systems
 - Filing into ImageRight and creating tasks within the system
 - Perform basic research in Sagitta
- Develop good relationships with others on the client service teams
- Handle Reception Desk duties:
 - Promptly and professionally answer incoming calls and direct to the appropriate associate
 - Greet visitors as they arrive, offer parking validation, request visitor to login and inform the appropriate associate of their arrival
 - Handle all incoming mail and inter-office mail
 - Maintain conference room calendar and assist with meeting set-ups and take downs
 - Assist with clerical tasks to include copying, faxing, mailings, assembling binders and production of client ID cards

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, adjusting priorities often, and managing frequent interruptions.

In addition, the following is required:

- Bachelor degree.
- Must type a minimum of 65wpm and be skilled (intermediate level) in using MS Office software; preferably version 2016.
- Basic math and professional level business writing skills.
- Proficiency with personal computers and Microsoft Office applications (i.e., Word, Excel and PowerPoint) in creating presentations and documents, including database and spreadsheet data entry. The ability to operate standard office equipment.
- Excellent phone personality and neat appearance.
- Skill in organizing resources and establishing priorities.
- Alert, positive and approachable demeanor.
- Must be dependable, possess a strong attention to detail and enjoy working in a fast paced team environment.

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.