



Job Title: **Lead Benefits Specialist**

Position Description

To perform this job successfully, an individual must be able to perform the essential job functions consistently and to the satisfaction of the employer. Reasonable accommodations may be made for qualified disabled individuals. This job description is not an exhaustive list, as employees may be required to perform duties not specifically designated within this document, at the employer's discretion. The Escambia County School District reserves the right to modify or interpret this job description as needed.

FLSA Status: Nonexempt
Reports to: Appropriate Supervisor or Designee
Supervises: Appropriate Staff as required
Pay Grade: Educational Support – 23



JOB SUMMARY

The purpose of this position is to perform highly complex administrative support work, and administer a variety of paraprofessional and technical tasks and functions relating to risk management and benefits in all phases of benefits administration.

ESSENTIAL JOB FUNCTIONS

- Leads, instructs, and reviews the work of lower level employees; assists with highly complex risk management, human resource, and payroll related functions.
- Manages, schedules, and coordinates insurance enrollment for new and retired employees.
- Performs verification and reconciliation tasks according to department checks and balances to maintain data integrity and prevent errors; verifies and corrects discrepancies.
- Conducts and modifies benefits dissemination for new or retired employees detailing all benefits coverage and options available to School District employees.
- Counsels employees regarding benefits, claims, changes, policies, premiums, dependent coverage, and maintaining coverage while in various employment statuses.
- Investigates claim denial by the provider, conducts research of medical data, communicates with the insurance agent on claim disagreements, and intercedes on behalf of the employee to obtain reimbursements.
- Coordinates all short term and long term disability claims to determine disability entitlement and monetary benefits.
- Determines, coordinates, and processes outstanding medical claims, determines appropriate beneficiary or designated estate, etc., prepares documentation for obtaining a death certificate, and prepares the required documentation for distribution of death claim checks.
- Administers the School District's Tax Shelter Annuity (TSA) and Mutual Fund programs; coordinates approved TSA companies and Mutual Fund companies.
- Advises and assists qualifying employees with Medicare claims and processes the necessary forms for eligibility and payments.
- Intercedes on behalf of the employee regarding claim problems.

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- Assists employees eligible for COBRA benefits with completion and processing of required paperwork and premium payments to obtain or maintain coverage.
- Assists employees with enrollment in benefits online and through manual forms.
- Counsels employees regarding benefits, claims, changes, policies, premiums, status changes, and dependent coverage.
- Provides provisions and/or modifications to the Employee Benefits Guide and/or Retirement Guides regarding health, life, disability, tax annuity, or mutual fund annuity; specifies rules and regulations to ensure that each employee receives accurate and complete information from insurance personnel.
- Serves as an insurance representative answering questions and resolving matters relating to health, life, and disability coverage.
- Serves as liaison with the various medical providers and the School District's servicing agents.
- Assists directly in the development, implementation, and administration of group health, life, disability, and employee benefits program for the District School Board.
- Operates various office equipment, e.g., computer terminals, printer, copy machines, telephone systems, facsimile machines.
- Displays confidentiality in dealing with sensitive issues.
- Answers questions on the phone and at the counter regarding benefits.
- Inputs college verification on dependents over the age of 19 to ensure coverage under dental, vision, and life.
- Performs other duties as assigned.

MINIMUM REQUIREMENTS

- Associate Degree or equivalent college level course credit. Bachelor's Degree preferred.
- Four (4) years of experience in benefits administration, human resources, or closely related field.
- An equivalent combination of education, training, and experience which provides the required knowledge, skills, and abilities to perform the essential functions of the job.

KNOWLEDGE, SKILLS, AND ABILITIES

- Requires the ability to display knowledge of applicable federal guidelines for Medicare and Medicaid coverage.
- Requires the ability to read, interpret, and explain various insurance policies.
- Requires the ability to display knowledge of Government laws and regulations regarding the administration of life, health, and disability insurance coverage.
- Requires the ability to display knowledge of principles and practices of insurance and programs relating to general and financial liability protection.
- Requires the ability to display knowledge of financial, technical, and legal requirements for developing, implementing, and administering insurance coverage.
- Requires the ability to display knowledge of business English, spelling, and punctuation.
- Requires the ability to display knowledge of accounting principles, practices, and procedures and the application of such knowledge to accounting transactions.
- Requires the ability to display knowledge of modern office practices and procedures.
- Requires the ability to display knowledge of recordkeeping methods, practices, and procedures.
- Requires the ability to display knowledge of the use of specified computer applications involving data entry and standard report generation.

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- Requires the ability to display knowledge of interpersonal skills necessary to effectively interact with internal staff, administrative officials, and the general public.
- Requires the ability to display knowledge of routine word processing and a familiarity with computer operations.
- Requires the ability to develop effective working methods and procedures.
- Requires the ability to interpret, explain, and apply laws, rules, policies, and regulations governing health, life, disability, and retiree coverage and the administration of tax shelter annuity and mutual fund programs.
- Requires the ability to assemble and organize data and preparing reports from such data.
- Requires the ability to develop and maintain effective working relationships with other employees, insurance carriers or companies, state agencies, and the general public.
- Requires the ability to meet and deal with employees in an effective, courteous, and cooperative manner.
- Requires the ability to accept, receive, and/or collect payments and determine individual benefit eligibility.
- Requires the ability to modify, communicate, and present in a group setting, a comprehensive benefit plan that includes multiple insurance products, companies, and offerings to both new and existing employees through phone, face-to-face, and written interactions.
- Requires the knowledge of other department functions and the ability to communicate these as part of the new hire orientation.
- Requires the ability to accept, receive, and/or collect payments and determine individual benefit eligibility.

PHYSICAL DEMANDS

While performing the essential functions of this job the employee is regularly required to work in a typical office setting, use standard office equipment, read printed materials and a computer screen, and communicate in person and over the telephone and may be occasionally required to drive a motor vehicle. Sedentary work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. The work also requires the following physical abilities in order to perform the essential job functions: speaking, standing, hearing, and visual acuity.

WORKING CONDITIONS

Employees in this position work in a relatively safe, secure, and stable work environment.

Date of Board Approval: December 17, 2019, effective January 1, 2020

Date of Revision: March 18, 2025, effective July 1, 2024