



## **BENEFITS ASSISTANT I BENEFITS ASSISTANT II**

FC: CA114/CA113  
PG: CLK-III/CLK-IV

PC: 021/031  
BU: 09 (Non-Represented)  
Created: October 1995  
Revised: August 2005

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

### **DEFINITION**

Under general supervision, performs a variety of administrative and customer services activities in support of the District's employee benefits function; performs related duties as assigned.

### **CLASS CHARACTERISTICS**

#### **Benefits Assistant I**

This is the experienced level class in the Benefits Assistant series. Positions at this level are fully competent to perform a variety of administrative and customer services support duties. At this level guidelines and supervision are readily available in order to make decisions in non-routine circumstances.

#### **Benefits Assistant II**

This is the journey level class within the Benefits Assistant series. Incumbents within this class is distinguished from the Benefits Assistant I in that the latter functions independently, performing the full range of duties related to the processing of forms and other documents related to the District's employee benefit programs and services. Positions in this class are flexibly staffed and are normally filled by advancement from the "I" level, or, when filled from the outside, have prior experience.

### **REPORTS TO**

This position reports to the Principal Personnel Analyst.

**EXAMPLES OF DUTIES** – *Duties may include, but are not limited to, the following:*

## **Benefits Assistant I/II**

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1. Receive, review, and answer a variety of questions relating to the District's health and welfare programs, retirement plan, and other employee benefit plans.
2. Assist walk-in and telephone callers in completing necessary forms and other documents.
3. Input and maintain all Benefits-related information into the Human Resources Information System (HRIS); enrollment or cancellation of coverage for employees and their dependents in the various medical, dental, vision, and insurance programs.
4. Provide information regarding benefit plans and answer questions about coverage for over-age dependents, domestic partner benefits, "COBRA " (continuation of medical coverage for terminated or retired employees as well as dependents who have reached age 19 and are not full time students).
5. Prepare monthly medical reports; notify the insurance companies of changes in enrollments and expected premiums for the month.
6. Send out annual notification and applicable forms for employees to enroll in additional life and/or disability insurance.
7. Gather and input data into computer systems regarding benefit coverage.
8. Prepares, types, and proofreads correspondence.
9. Act as liaison with insurance companies, medical providers' offices, and PERS, regarding matters relating to the enrollment in and provision of medical/dental/vision coverage for District employees.
10. Conduct new hire orientations with new employees; reviews and explain benefits enrollment forms; respond to and resolve questions.
11. May cross-train with Investment Plans Assistant.

## **QUALIFICATIONS**

### **Knowledge of:**

Basic office practices and procedures, including filing and the operation of standard office equipment.

Correct English usage, including spelling, grammar, and punctuation.

Business letter writing and the standard format for typed materials.

Policies and procedures related to the department to which assigned.

Basic business data processing principles and the use of word processing equipment.

**Skill in:**

Developing and maintaining effective working relationships with those contacted in the course of the work.

Maintaining accurate records and files.

Making accurate arithmetic calculations.

Performing detailed clerical work accurately.

Maintaining attention to detail despite interruptions.

Organizing and maintaining office files.

Composing routine correspondence from brief instructions.

Using initiative and sound independent judgment within established guidelines.

Operating standard office equipment including a personal computer word processor and centralized telephone equipment.

Prioritize work and coordinate several activities.

Communicating tactfully and effectively with the public.

**MINIMUM QUALIFICATIONS**

**BENEFITS ASSISTANT I**

**Education:**

Possession of a high school diploma, GED or recognized equivalent.

**Experience:**

Two (2) years of (full-time equivalent) verifiable clerical experience related to human resources. Experience in a public agency setting is preferred.

**BENEFITS ASSISTANT II**

**Education:**

Possession of a high school diploma, GED, or recognized equivalent.

**Experience:**

Four (4) years of (full-time equivalent) verifiable clerical experience related to human resources, at least one (1) year of which must have been as a Benefits Assistant I with the District or the equivalent elsewhere. Experience in a public agency setting is preferred.

**Other Requirements (applies to both positions):**

Must be able to type accurately at a rate of 50 net words per minute.

Must be physically able to lift and carry boxes/objects weighing up to 25 lbs. with the assistance of a handcart, stand, stoop, and reach to file and retrieve records from shelves.

**WORKING CONDITIONS**

**Environmental Conditions:**

Office environment; exposure to computer screens.

**Physical Conditions:**

Requires maintaining physical condition necessary for lifting and carrying; walking, or standing, or sitting for prolonged periods of time.