

PENNSYLVANIA STATE EDUCATION ASSOCIATION
Job Description

Job Title: Health and Welfare Fund Assistant (Employee Benefits Specialist/Assistant)

Location: PSEA Headquarters - Harrisburg

Reports to: Benefits Manager

Salary: \$65,000

Job Definition

This position supports the Health and Welfare Fund (HWF) program. The work is performed by HWF Assistants who function as the guardians of the Association's HWF records, databases, and financials (which relate primarily to the Fund's Employer Paid Benefit Programs of vision, dental, life, and disability) by applying complex document/information processing and record keeping principles and practices. A major component of the work involves handling phone inquiries, enrollment processing, reconciliations, generating and verifying premium statements and invoices, and transactions associated with the orderly operation of Fund activities.

The incumbent performs an important role in providing liaison between members and vendors to ensure good service, quality information, and seamless and continuous HWF products. They prepare reports on schedule and at the request of the Fund Manager in such areas as COBRA participation, benefit utilization, and the Fund's actuarial data requirements.

Job Duties and Responsibilities

1. Reconcile premium and billing statements, eligibility reports, enrollment reports, and bank statements.
2. Preparation of premium statements, ACH templates, preparation of invoices to ensure proper payment of premium, distribution of eligibility rosters to participating employers, and communications with local school officials and others who provide premium and enrollment data.
3. Answering phone and email inquiries and questions from employers and participants and while delivering a high level of customer service. Retrieve and respond to phone mail messages in the Health and Welfare Fund voice mailbox.

4. Input premium received from participating employers and COBRA participants into the Health and Welfare Fund's data system.
5. Update data relating to participating employers.
6. Administer COBRA as required by Federal Law, including distribution of notification to new participating employees and their families, distribution of notification to terminated employees and/or their family members, determination of COBRA eligibility, preparation and distribution of COBRA invoices, recording COBRA income, corresponding with COBRA participants who are delinquent in the payment of their monthly premium, determining termination of benefits for non-payment of monthly premium, and processing requests for cancellation of COBRA coverage.
7. Process full-time student certification forms and distribute notices.
8. Reconcile claims and administrative fees paid to the Fund's third-party administrator and post claims expense to each participating employer's account.
9. Determine appropriate account distribution of daily deposits and prepare journal entries and post entries from the journal entry input sheet to the Fund's account system.
10. Perform other accounting and financial duties as assigned by the supervisor.
11. Receive, review, and process enrollment applications for the Fund's programs.
12. Coordinate the PSEACare enrollments, including supplies needed, mailing coordination, billing, enrollment, termination, new enrollee material distribution, and enrollment updates to the appropriate third-party administrators.
13. Assist with the resolution of participants' disputes/complaints in an expeditious and appropriate manner, including investigating complaints, reporting findings, communicating solutions to participants and follow-up to ensure solutions are implemented, and maintaining a record of each dispute, problem, concern, and/or issue including the resolution thereto, to ensure that quality and customer service objectives are met.
14. Act as liaison between members/participants and third-party administrators/vendors.
15. Process requests for information and materials.
16. Research and communicate information to members/participants/employers/vendors effectively.

17. Maintain an organized and comprehensive filing system for the forms and other documents associated with the Health and Welfare Fund.
18. Input enrollment data into Health and Welfare Fund database and ensure integrity of database.
19. Provide administrative and secretarial support to the professionals within the Division.
20. Assist with the preparation of proposals and contracts for employers.
21. Perform routine functions including filing, maintaining mail lists, and mail distribution.
22. Assist with arrangements for meetings of the Board of Trustees.
23. Perform other duties as assigned by the supervisor.

Knowledge, Skills, and Abilities

- Ability to multi-task while maintaining proficiency in the conduct of responsibilities.
- Knowledge of bookkeeping and reconciliation principles and practices and methodologies of effective record keeping. Ability to process a significant number of journal entries. Strong quantitative skills are required.
- Ability to handle high a high volume of phone calls and email activity, process large amounts of benefit enrollments, develop and process a large quantity of premium invoices.
- Ability to perform highly detailed work with written and numeric data requiring considerable concentration and the facility to perform standard arithmetic calculations rapidly and accurately.
- Knowledge of comprehensive administrative procedures, practices, and eligibility criteria; and associated record keeping principles.
- Knowledge of the aspects of the ERISA (Employee Retirement Income Security Act) statute and COBRA regulations.
- Skill in performing standard desktop PC applications, including Microsoft Office.
- Proficiency in communicating effectively in a business environment while resolving conflicts and explaining procedural issues; both orally and in writing.

- Skill in solving problems related to benefits regulations, procedures, and processes.
- Compilation skills that apply established routines and standing instructions in collecting, verifying, assembling, and posting varied data, and involve diagnosing data errors and reconciling financial discrepancies.
- Ability to apply HWF procedures and practices in the performance of assigned responsibilities.
- Ability to prepare routine and proceduralized financial reports and statements.
- Ability to quickly develop a working knowledge of the inter-relationships between PSEA membership and HWF information systems.
- Ability to exhibit high level customer service traits (eg. effective listening, consideration, patience, understanding, cooperation), use tact and discretion in potentially confrontational and problem situations, and use judgment in dispensing business related information.
- Ability to apply established methods and procedures in updating and maintaining IS database files, processing and posting financial transactions, and performing complex record keeping. Preparation of premium statements, ACH templates, preparation of invoices to ensure proper payment of premium.
- Ability to apply independent judgment and adapt to quick shifts in priority or service needs while following and conforming to established procedure.
- Ability to quickly learn organization bi-laws, Fund financial record keeping practices, and handbook rules and standards.

Education, Experience, and Special Requirements

A high school diploma or equivalent is required.

A minimum of two years of experience performing benefit administration and experience performing bookkeeping, clerical accounting, or benefits financial records work is required.

To apply for this position, please send a letter of interest and resume to: jobs@psea.org no later than Monday, October 16th.

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