

Job Description for: Benefits Specialist

POSITION STATUS: Non-exempt

POSITION REPORTS TO: Team Leader

MAJOR RESPONSIBILITIES:

- Act as primary resource for clients and their employees with benefit or claim questions.
- Investigate and solve claim problems.
- Provide community resources to those in need.
- Log all calls into Call Center database for tracking and reporting purposes (100% call tracking).
- Take requests from clients for supplies and forward to the appropriate account administrator.
- Act as a client resource for administrative questions regarding enrollment and eligibility and special contract provisions.
- Provide assistance with coordination of benefits.
- Track trends to identify consistent claim and/or benefit question patterns from clients.
- Report trends to carrier and/or the account manager.
- Run reports for assigned producer team when requested.
- Maintain open call volume.

PROFESSIONAL DEVELOPMENT:

- Remains informed regarding industry information and new product information.
- Licensed agent for life and disability insurance or able to secure license within 12 months of employment.

TRAINING WILL INCLUDE:

- On-site ongoing training provided for all above duties.
- Off-site training as required for continuing education requirements.

CORE JOB OBJECTIVES:

- Establish effective working relationships with Internal Partners, Clients and Carriers
- Demonstrate a “whatever it takes” attitude to ensure client satisfaction and to support key initiatives.
- Work with Internal Partners and Carriers to ensure accurate and timely responses to all client issues.
- Work with all partners in a manner that fosters mutual respect and teamwork.
- Respond to requests from all partners by stated timeframes.
- Consistently be on time for work and all scheduled meetings and training classes.
- Respond to BRC emails and voicemails, when assigned, within 24 business hours.

REQUIRED SKILLS AND QUALITIES:

- Bilingual.
- Must currently hold life and disability insurance license (or must obtain it within 12 months following date of employment) and retain license by meeting the continuing education requirements.
- High level of computer literacy including working knowledge of Windows 2003, Excel, Word and call tracking systems.
- Organized.
- Strong attention to detail and ability to self-check work.

- Excellent time management skills, keeps manager informed of problems.
- Ability to prioritize work load.
- Enthusiastic attitude, cooperative team player, adaptable to new or changing circumstances, professional demeanor, sensitive to client needs, self-motivated, creative and innovative.
- Excellent problem solving skills.
- Strong verbal and written communication skills.
- Prior customer service experience is preferred.