

**PENNSYLVANIA STATE EDUCATION ASSOCIATION**  
**Job Description**

**Job Title:**               **Benefits Specialist**

**Reports to:**           **Human Resources Manager**

**BU/ FLSA Status:**   **Exempt**

**Level:**               **Five**

**Job Summary**

The benefits specialist is responsible for assisting with the administration of all benefits and retirement programs, including medical, dental, vision, life insurance, short- and long-term disability, leave management, pension and 401(k) plan.

This position performs varied assignments targeted at maintaining effective operations and services to employees and retirees/beneficiaries. The job is built around the administrative and operational needs of the division that require coordination, analyses, and problem-solving skills. The incumbent provides responses to inquiries pertaining to the division's function.

Work entails a wide variety of responsibilities, many of which have a direct effect upon the quality, internal controls, and timeliness of division services. The work is accomplished both independently and collaboratively. Responsibilities include such activities as analyzing administrative operations, developing and recommending installation of work standards, processes, and procedures, preparing comprehensive reports, drafting budgetary information, preparing staff meeting agendas, organizing program-related materials for presentations, and performing various outside contacts and liaison duties. The employee may also be responsible for carrying out several divisional programs.

The employee will continuously work with confidential and sensitive information. Work is reviewed through reports, staff feedback, and general oversight of performance and results.

**Job Duties and Responsibilities**

*Pension Related Duties:*

- Explains retirement benefit plan policies, procedures, and legal requirements to employees and beneficiaries.
- Conducts/Reviews retirement and benefits-related calculations and analysis including purchase of service, withdrawal of contributions, and deferred

retirement.

- Provides information and assistance to participants regarding purchased service credit and retirement estimates.
- Conducts benefits consultations with employees regarding retirement and pension. As needed, conducts group benefits presentations.
- Receives and coordinates the distribution of relevant information and documentation to plan participants and beneficiaries.
- Develops and maintains records of participants and beneficiaries including active, deferred, retired, and vested terminated employees.
- Serves as a liaison between beneficiaries and participants and the plan administrator, handling or facilitating requests and other administrative changes.
- Serves as the administrative liaison to the PSEA Pension Plan Committee.
  - Schedules pre-meeting planning and other conference calls.
  - Prepares and/or coordinates meeting materials and chair notes.
  - Prepares and/or coordinates distribution of meeting notices to the parties involved.
  - Produces minutes of meeting.
- Coordinates with actuaries, plan administrators, accountants, and other professionals to provide verified and compiled data for administration of benefits.
- Prepares and processes relevant documentation for annuity payments. Coordinating with PNC Bank, acts as the liaison between retiring members and maintains updated retiree information.
- Communicates with terminated staff regarding vested interest, sets up annuity payments within relevant timelines, and coordinates payments with the PSEA actuary and the bank.
- Executes steps associated with employment terminations and disposition of funds.
- Assists the PSEA actuary in the preparation of the mid-year and year-end valuations of the Pension Plan including researching and responding to inquiries from the actuary.
- Ensures retirement plans are administered in accordance with company, state, and federal guidelines and regulations.
- Monitors and coordinates issues of importance to the pension plan to ensure timely handling.
- Maintains knowledge of legal and regulatory changes, trends, and other developments affecting retirement benefits.
- Coordinates the posting and distribution of the Summary Annual Reports. Works with the actuary to produce and distribute accurate Annual Pension Benefits Statements to all staff.

### *Insurance*

- Responsible for ensuring that PSEA's enrollment is accurate and that the monthly insurance bill is paid in a timely manner.
- Enrolls employees with carriers and processes life status changes. Consults with staff regarding domestic partner medical insurance coverage.

- Completes and distributes documentation to collect updated information pertaining to employee and dependent life status changes, including marriage, divorce, address, dependents, beneficiary, and death and employment status changes such as hiring, resignation, termination, retirement, transfer, and promotion.
- Researches and responds to staff, dependent, and retiree medical benefit-related inquiries.
- Maintains insurance information in the HRIS, including enrollments, changes, premiums, and benefit plans.
- Responsible for ensuring that timely COBRA notifications are made.
- Administratively processes all new hires and transfers within the HRIS and associated programs.
- Assists with enrollment for Post Retirement Medical Insurance (VEBA and Non-VEBA) benefits.
- Assists employees regarding benefits claim issues and plan changes.
- Prepares correspondence related to updated rates and distributes notification to all affected parties, including annuitants, staff, and the bank.
- Distributes all benefits enrollment materials and reviews eligibility.
- Responds to benefits inquiries from managers and employees on plan provisions, benefits enrollments, status changes and other general inquiries.
- Calculates monthly premium changes due to individual contract changes and takes the required action to implement.
- Works to secure eligible reimbursement from federal and state funding sources (e.g., RDS, ERRP, etc.).
- IRS submission of ACA data.

#### *Benefits Administration*

- Administratively handles enrollment, changes, and termination of staff into our Dental/Vision programs.
- Processes and administers all extended leave-of-absence requests and disability paperwork: medical, personal, disability and FMLA.
- Effectively interprets FMLA implications as they relate to leaves of absences/disabilities. Generates official organizational FMLA communications. Consults with outside medical expertise as needed. Monitors relevant timelines on FMLA leave.
- Assists staff in filing disability insurance claims including researching eligibility criteria, completing required documentation, contacting insurance carriers, and communicating with medical providers as necessary. Processes payment of all claims and notifies staff members, insurance carriers, and medical providers about payment information.
- Consults with staff to collect updated information regarding Regular Life Insurance/Optional Life Insurance beneficiary changes. Provides and assists staff with the completion of forms to be submitted to and processed by the life insurance carrier. Communicates with family members and beneficiaries

- regarding benefits available upon death of a staff member. Processes claims for payment with the insurance carrier.
- Responds to general 401(k) inquiries from employees relating to enrollments
- Administratively handles the open enrollment process, annually, regarding the Section 125 program. This includes changes and termination of staff.
- Monitors Worker's Compensation claim status through return-to-work orders. Contacts staff members, medical providers, and insurance carriers to receive and report updated information as it relates to lost time from work.
- Performs quality checks of benefits-related data.
- Reviews invoices and billing for approval.

#### *Payroll Administration*

- Responsible for submitting all necessary payroll authorizations on a bi-weekly basis.
- Generates Employment Status Forms from the HRIS for designated employment changes, secures authorization, and submits to Payroll.
- Organization Entry
  - Ensures that new hires are enrolled in all eligible benefit programs.
  - Ensures that property provided to employees is recorded.
- Organizational Exit
  - Ensures that benefits are properly handled for terminating employees
  - Ensures that leave is properly handled for terminating employees.
  - Coordinate with other divisions to ensure that PSEA property is returned.

#### *HRIS Administration*

- Manages Human Resources/Benefits setup by creating new benefit plans/changes, new positions, team changes, and position creation and deletion.
- Identifies and recommends ways for the system to be better utilized.
- Recommends methods to improve the efficiency of the system.

#### *Other HR Support*

- Recruiting and Selection
- Seniority Report
- PA Department of Labor (new hire)
- Annual EEO1 Report and regional reports as requested by DOL.

#### *General Duties*

- Provides high level administrative support for functional areas and projects within the division or department.
- Engages in research, analysis, compilation, and reporting of specialized or ongoing requests.
- Works on special project assignments as assigned.
- Reviews information in various forms to understand, interpret, explain, and summarize its relevance and impact on divisional functions.
- Ability to handle confidential and sensitive matters, including preparing and communicating on such matters.
- Analyzes divisional or departmental operations and develops and recommends

- modifications to methods and processes.
- Attends meetings on behalf of the division or department as assigned or requested.
  - Performs other responsibilities as assigned by the divisional or departmental manager to assure orderly operations.

### **Knowledge, Skills, and Abilities**

- Excellent interpersonal skills with ability to clearly explain retirement plan options in easily understood terms.
- Excellent organizational skills and attention to detail.
- Thorough understanding of laws, regulations, and agency interpretations or opinions related to retirement benefits.
- Proficient with Microsoft Office Suite or related software.
- Human Resources Information System knowledge.
- Extensive knowledge of employee benefits and applicable laws.
- Knowledge of standard methods of collecting, evaluating, interpreting, summarizing, and reporting on data relating to divisional programs.
- General knowledge of PSEA program and business operations and structure that relate to job responsibilities.
- Knowledge of modern office management practices and associated technology.
- Knowledge of general information referencing and accessing methodologies of manuals and program-related documents.
- Knowledge of specialized office procedures and practices, which relate to work processes and program activities.
- Skill in performing computer applications which record, access, and report on divisional information elements and programs.
- Possession of well-developed interpersonal skills.
- Possession of coordinative, analytical, and problem-solving skills that effectively support division-level operations.

- Skill in organizing and carrying-out staff assignments requiring the packaging and presentation of materials, and development and execution of procedures without direct supervision.
- Ability to read, understand, interpret, and explain provisions that relate to divisional functions.
- Ability to produce exhibits in support of divisional functions.
- Ability to communicate effectively and professionally in a business environment both orally and in writing.
- Ability to establish and maintain effective working relationships with colleagues, managers, employees, members, governance, and the public.
- Ability to apply the essential knowledge requirements in dealing with problems encountered in general division administrative matters.
- Ability to prepare administrative and technical reports.
- Ability to work independently and adapt to shifts in priority requirements while following and conforming to the division calendar.
- Ability to identify information of a confidential or highly sensitive nature and determine how to properly handle such information.
- Ability to adapt to occasional travel and weekend work requirements.
- Stamina to perform job functions and meet deadlines.

### **Education, Experience, and Special Requirements**

Associate's degree (is preferred) in HR or related field, but experience and/or other training/certification may be substituted for the education.

A minimum of three years of retirement and insurance benefits is required.

CEBS Certification preferred. SHRM-CP or SHRM-SCP a plus.

Possession of a valid driver's operating license

As of 4/2/2024