

# JOB DESCRIPTION

## BENEFIT ACCOUNT MANAGER, BENEFIT DEPARTMENT

### Summary

Under the direction of the Director, Client Services; provide superior service in expanding and maintaining the Benefit Department client base; analyze and maintain your client book of business by quoting, handling client requests by mail, telephone, fax, email, or in person from the policyholders, carrier representatives, or others concerning their insurance needs.

### Essential Duties and Responsibilities

Include the following; other duties may be assigned:

### Service

- Foster client relationships
- Ensure compliance items in the Service Plan/Benefit Planning Calendar
- Resolve routine claims, billing, and enrollment issues
  - Enter member specific data into census tab and link it to the activity in BKB
- Maintain client files by entering the information provided by the Benefit Consultant (new and renewal business)
- Be a liaison between client and carriers
- Participate in finalist meetings with Sales Consultant for new business opportunities
- Request claims for renewal review/marketing, save reporting in system
  - Ensure reporting is requested for all applicable lines of business from each in force carrier
- Open renewal files and advise Benefit Consultant of missing data
- Market group to carriers as directed by Benefit Consultant
  - Track carrier responses to RFPs to ensure all quotes are received by due date
  - Prepare draft proposals for Benefit Consultant review/feedback
- Finalize proposals and prepare for delivery to client
  - Overview, benefit summaries, financials, etc.
- Notify group and/or COBRA vendor of COBRA rates
- Close out renewal files and renew on system
- Initiate 5500 filing with Compliance Manager
- Review Renewal Sign Off for Benefit Consultant to confirm accuracy of data
- Register client for ThinkHR and Seubert Secure
- Ensure timely completion of activities in BKB
- Coordinate open enrollment meeting schedules with client, including Sales Consultant, Benefit Consultant, and carrier representatives when applicable

### Financials

- Complete self-funding analysis proposal template
- Complete fully insured proposal for Benefit Consultant to deliver to client
- File reporting package in BKB

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## Compliance

- Field compliance inquiries and advise Benefit Consultant and/or Compliance Manager
- Ensure Benefit Consultant sends Compliance email; file Compliance email in BKB
- Ensure Compliance Renewal Wrap Up is sent to client by Benefit Consultant; file Compliance email in BKB

## Wellness

- Field questions regarding wellness; advise Well-Being Coordinator of any client concerns or changes

## Miscellaneous

- Maintain insurance license(s)
- Adhere to Agency policies, procedures, and codes of conduct
- Participate in seminars and classes for skill and knowledge development
- Perform other assigned duties or functions as required to meet business objectives

## Supervisory Responsibilities

There are no supervisory responsibilities for this position.

## Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

- **Problem Solving** - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; uses reason even when dealing with emotional topics
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information
- **Planning/Organizing** - Prioritizes and plans work activities; uses time efficiently; plans for additional resources; sets goals and objectives
- **Quality** - Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality
- **Quantity** - Meets productivity standards; completes work in timely manner; strives to increase productivity and efficiencies; works quickly
- **Safety and Security** - Observes safety and security procedures; reports potentially unsafe conditions; uses equipment and materials properly

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- **Adaptability** - Adapts to changes in the work environment; changes approach or method to best fit the situation; able to deal with frequent change, delays, or unexpected events
- **Attendance/Punctuality** - Is consistently at work and on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time

## Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience**  
Two-year certificate from college or technical school; or four to six months related experience and/or training; or equivalent combination of education and experience
- **Language Skills**  
Ability to read and interpret documents such as insurance contracts and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization
- **Mathematical Skills**  
Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals; ability to compute rate, ratio, and percent and to draw and interpret bar graphs
- **Reasoning Ability**  
Ability to solve practical problems and deal with a variety of variables in situations where only limited standardization exists; ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form
- **Computer Skills**  
Knowledge of Microsoft Office Suite, Internet Explorer, AMS Sagitta, Word Process, or other document management system, Zywave applications, Salesforce, BrokerBriefcase, account management system, AgencyFuel reporting, beginner level database management, and spreadsheet software
- **Certificates/Licenses/Registrations**  
Pennsylvania Driver's License  
Pennsylvania Insurance License
  - Life & Health

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- **Other Skills & Abilities**  
N/A
- **Other Qualifications**  
N/A

## **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, sit, use hands and fingers, reach with hands and arms, climb or balance, stoop, kneel, crouch, or crawl, and speak or hear. The employee must occasionally lift and/or move up to 10 pounds and be able to drive a vehicle. Specific vision abilities required by this job include close vision, depth perception, and ability to adjust focus.

## **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually quiet.