

**CLASS SPECIFICATION**

**SAN DIEGO CITY CIVIL SERVICE COMMISSION**

**BENEFITS REPRESENTATIVE II**

**DEFINITION:**

Under general supervision, to perform the more difficult and complex processing and calculations of employee benefits transactions, including withdrawals, paybacks, forfeitures, termination payments, and claims reimbursements, involving a wide variety of options and variables; to perform accounting clerical work to reconcile and balance control documents; and to perform related work.

**DISTINGUISHING CHARACTERISTICS:**

Benefits Representative II is distinguished from Benefits Representative I in the higher level of independence and discretion exercised in interpreting plan documents, resolving benefit coverage issues and approving claims reimbursements. Benefits transactions processed by incumbents typically involve complex calculations utilizing numerous variables which impact the accuracy of benefit allocations. Positions classified at this level may be underfilled in accordance with the City's Career Advancement Programs.

\* **EXAMPLES OF DUTIES:**

- Determines employee eligibility for benefit plan coverage;
- Processes enrollments and changes;
- Provides information regarding provisions of plan documents, benefit coverage, options available, and applicable tax rules and regulations;
- Processes requests for withdrawals, paybacks, benefit payments, and claims reimbursements;
- Performs complex calculations to determine allowable maximum contributions, forfeitures, vesting adjustments, values of suspense accounts and spousal accounts;
- Identifies and tracks employee accounts to ensure compliance with maximum limits and determine whether money is due the City or the employee;
- Investigates and resolves complaints regarding coverage under City-Med Health Insurance and explains results to employees;
- Researches and investigates claims to determine if expenses are eligible for reimbursement, and ensures that tax guidelines are adhered to;
- Identifies overpayment of benefits and arranges repayment schedules;
- Performs a variety of clerical accounting tasks to reconcile, balance, and maintain accounting records for assigned benefits and savings plans;
- Identifies discrepancies and takes corrective action;
- Maintains manual and computer records and fiscal records subject to audit;
- Prepares routine correspondence and reports.

**MINIMUM QUALIFICATIONS:**

Please note: the minimum qualifications stated below are a guide for determining the education, training, experience, special skills, and/or license which may be required for employment in the class. These are re-evaluated each time the position is opened for recruitment. Please refer to the most recent Job Announcement for updated minimum qualifications.

One year of clerical experience, **AND** six months of experience processing, researching and evaluating requests for withdrawals, paybacks or claims reimbursements; performing complex calculations to determine allowable maximum contributions, forfeitures, vesting adjustments and values of suspense accounts; or investigating and resolving complaints regarding benefits coverage and maintaining benefits-related financial records subject to audit.

- \* **EXAMPLES OF DUTIES** performed by employees in this class. The list may not include all required duties, nor are all listed tasks necessarily performed by everyone in this class.