

SUPERVISING INSURANCE TECHNICIAN

DEFINITION

Supervises and participates in the work of a branch in the Division of Risk Management and Insurance Services that is responsible for providing information to employees, retirees, and the public in regard to the District's programs for health and welfare or risk finance and insurance.

TYPICAL DUTIES

Supervises, assigns and reviews work, and participates in the activities of a branch engaged in the following:

- Providing information to employees, retirees, and various outside agencies regarding claims status; health and welfare benefits; contract insurance compliance; field trips, special events, and related activities; and eligibility requirements.
- Researching, interpreting, and explaining rules, regulations, policies, and procedures that pertain to various areas such as employee and dependent eligibility, insurance claims, and certificates of insurance.
- Adding, reinstating, or canceling active employees' and retirees' health benefits according to eligibility and receipt of documentation.
- Analyzing reports or documents, advising concerned parties, and resolving discrepancies.
- Reviewing, processing, and making deduction adjustments for flexible spending accounts; or recommending risk mitigation measures for field trips, events, and permits.
- Reconciling and verifying employee enrollment, insurance carrier membership reports, and dependency data.
- Maintaining electronic records of employee and retiree benefits information, preparing reports, and initiating correspondence.
- Establishes priorities and schedules in consultation with supervisors.
- Participates in District-wide presentations pertaining to health benefits or risk finance & insurance.
- Initiates and recommends procedures for new projects to simplify and expedite workflow.
- Assists information technology personnel in testing for system errors and ensures all data and information are uploaded accurately and in a timely manner.
- Prepares various reports related to benefits or risk insurance for the administration or for other departments.
- Trains and evaluates new employees.
- May supervise and participate in reasonable accommodation processes.
- May supervise the Risk Finance Fingerprint program.
- Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Supervising Insurance Technician supervises and reviews the work of lower-level employees involved in maintaining health and welfare benefits or insurance compliance; participates in the work of the branch; and performs and responds to the more difficult work and problems.

A Senior Insurance Technician responds to and resolves the more difficult and complex inquiries by applying detailed knowledge of rules and regulations in interpreting District health and welfare benefits, contracts, reasonable accommodations, liability claims or insurance compliance. Positions in this classification may have assigned specialty areas.

SUPERVISION

General supervision is received from a manager or higher-level supervisory employee in the Division of Risk Management and Insurance Services. General supervision is exercised over Senior Insurance Technicians, Insurance Technicians, and may be exercised over other lower-level clerical employees.

CLASS QUALIFICATIONS

Knowledge of:

- Health and welfare benefits programs available to employees of and retirees from public agencies
- Provisions of labor contracts that pertain to various health and welfare plans
- Eligibility, enrollment, and conversion requirements as applied by the District and its various benefits plans
- Privacy guidelines set by state, federal, and local laws
- Principles, procedures, and terminology used in property, casualty, and self-insurance programs
- Premiums and schedules required for various insurance "direct billing" plans
- Varieties and types of claims filed for compensation
- Data processing codes used in personnel transactions
- Time reporting and payroll procedures
- Sources of information needed to verify personnel and payroll transactions
- School calendars for regular and year-round schools
- Office practices and procedures
- Principles of supervision

Ability to:

- Deal tactfully and effectively in contacts with employees, administrators, various representatives of outside companies and agencies, and the public
- Work accurately with figures
- Write clear, concise correspondence, reports, bulletins, and other documents
- Produce and analyze special reports and documents
- Understand, interpret, apply, and explain rules, policies, and procedures necessary for filing liability claims or for enrolling in, maintaining, or converting District benefits
- Train, supervise, and evaluate the work of lower-level employees
- Recognize and evaluate problems related to workflow and procedures
- Organize and maintain files and keep accurate records
- Apply personnel and payroll codes in evaluating employee eligibility and work history
- Operate an office computer with Microsoft operating systems and software
- Operate various office machines

ENTRANCE QUALIFICATIONS

Education:

Graduation from high school or evidence of equivalent educational proficiency. Sixty semester

units or 90 quarter units from a recognized college or university. Additional qualifying experience or experience involving the application of personnel or payroll regulations may be substituted for the two years of required education on a year-for-year basis provided that the requirement of a high school diploma or equivalent is met. Courses in business administration and writing are highly preferable.

Experience:

Three years of experience interpreting and applying rules and regulations in one of the following: enrolling, determining eligibility, and maintaining employee health and welfare benefits or reviewing insurance certificates for compliance. One year of call center or customer service lead or supervisory experience in employee benefits or risk insurance is preferred.

The class description is not a complete statement of essential functions, responsibilities, or requirements. Entrance requirements are representative of the minimum level of knowledge, skill, and /or abilities. To the extent permitted by law, management retains the discretion to add or change typical duties of a position at any time, as long as such addition or change is reasonably related to existing duties.

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