

Job Title: PAYROLL AND BENEFITS CLERK

Definition:

Under the general supervision of the Assistant Superintendent of Business Services and direct supervision to the Director of Risk Management & Payroll Services, performs a variety of technical, clerical and accounting duties in the areas of Medigap employee benefits, payroll and risk management.

Distinguishing Characteristics:

This classification is distinguished from others in that the incumbent performs a variety of duties with special emphasis on benefits accounting, employee database maintenance, record-keeping and reporting and customer service. The incumbent is also the Medigap administrative assistant for the Medigap board and processes all eligibility paperwork, etc.

Essential Job Duties:

The following tasks are essential for this position. Incumbents in this classification may not perform all of these tasks, or may perform similar related tasks not listed here:

1. Maintains all employee information for all District paid retirees and spouses.
2. Helps retirees with questions regarding moving to medigap.
3. Notify retirees in regards to applying for Medicare for themselves and their spouses.
4. Get copy of Medicare A & B coverage for retiree and spouse (if they choose to apply for our Medigap plan).
5. Verifies that each retiree qualifies for Medigap and obtains a letter from PERS/STRS to verify retirement. Transfers retirees over to the Medigap plan.
6. Reconcile purchase orders for payment of Medigap premiums.
7. Maintains and balances the Medigap checkbook, as well as, write checks for outstanding bills which have been approved. Assures that all checks signed with proper signature. Deposits quarterly checks within 15 days after the end of the previous quarter.
8. Reconciles payment registers with medigap benefit. Maintains accounting records for all insurance payments.
9. Receives cash payments, as needed and deposits according to established accounting procedures.
10. Processes forms for changing and maintaining benefits and responds to inquiries from retirees and vendors.
11. Make quarterly reports on the financial status of the Medigap Trust to the Medigap Board members (i.e. copy of check register, investment statements, income, payments, etc.). Also take information needed to the tax preparer by August 31st of each year.
12. Provides customer service including counter and phones.
13. Picks up mail and assists with sorting and distributing of such.
14. Performs general clerical support to risk management, payroll, and Medigap. Clerical for Medigap may include requesting authorization and/or payment for Medigap, sending out communications to retirees, District staff, and Medigap Boards as required to resolve any Medigap related issues.
15. Maintain security of sensitive personnel issues and Medigap materials. Archive important documents via scanning and/or back-up on electronic media.
16. Schedules Medigap meetings and is the note-taker for minutes at Medigap meetings. Medigap minutes will be sent to Board members within two weeks of each meeting.

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17. Inputs and updates benefit deductions, tax changes, direct deposit changes and other miscellaneous payroll changes in county HRS system.
18. Processes Workers' Compensation adjustments through the payroll system.
19. Completes search of records for reports, subpoenas and other verifications and completes required labor reports.
20. Maintains files, including preparation of terminated employee files for scanning.
21. Assists with all open enrollment periods, including health benefits and section 125 plans, and with new employee orientation as it pertains to benefits.
22. Assists with other risk management and payroll duties. Provides back up for both risk management and payroll personnel, as needed.
23. Performs other related duties as assigned.

Minimum Knowledge, Skill and Ability:

Knowledge of:

- Modern office methods
- Spreadsheet applications and database management
- Business correspondence
- Basic accounting procedures
- Operation of various office machines
- Use of correct grammar, spelling and punctuation
- Operations of a computer

Skill and Ability to:

- Perform difficult and complex calculations with speed and accuracy
- Maintain accurate records and reports
- Understand and follow oral and written directions
- Use modern office equipment and machines
- Keyboard neatly and accurately at 35 wpm on a five-minute test
- Communicate policy, rules and regulations in a positive, accurate manner
- Computer working knowledge and experience
- Communicate orally and in writing with use of correct grammar, spelling, and punctuation
- Maintain professional confidentiality
- Work in a positive, cooperative mode with fellow workers, departments, and supervisors

Training and Experience:

Any combination equivalent to training and experience that could likely provide the required knowledge, skills and abilities would be qualifying. A typical way to obtain knowledge, skills and abilities would be: high school diploma or equivalent, supplemented by additional courses in business, accounting and office procedures. At least three years of accounting experience, one of which must involve employee benefits accounting. School district experience desired but not required.

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- Require vision (which may be corrected) to read small print.
- Require mobility of arms to reach and dexterity of hands to grasp and manipulate small objects. Lower body mobility may not be required.
- Perform work, which may require sitting for prolonged periods.
- May be required to work at a computer terminal for prolonged periods.
- Is subject to inside environmental conditions.
- May be required to take and pass physical examination.
- Will be required to have live scan fingerprinting completed and cleared prior to beginning work.

PHYSICAL REQUIREMENT INFORMATION

Physical Demands:	HPD = Hrs. Per Day		
	Rarely (0 – 1.5 HPD)	Occasionally (1.5-3 HPD)	Frequently (3 – 6 HPD)
Sitting			X
Standing			X
Walking	X		
Bending (neck)			X
Bending (waist)		X	
Kneeling	X		
Reaching		X	
Stooping		X	
Crawling	X		
Twisting (back & neck)	X		
Climbing	X		
Pushing/Pulling	X		

	Lifting			Carrying		
	Rarely (0 – 1.5 HPD)	Occasionally (1.5 – 3 HPD)	Frequently (3 – 6 HPD)	Rarely (0 – 1.5 HPD)	Occasionally (1.5 – 3 HPD)	Frequently (3 – 6 HPD)
0 – 10 lbs.		X			X	
11 – 25 lbs.	X			X		
26 – 50 lbs.	X			X		
51 – 75 lbs.	X			X		

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Mental Demands:	Rarely (0 – 1.5 HPD)	Occasionally (1.5 – 3 HPD)	Frequently (3 – 6 HPD)
Problem Solve			X
Make Decisions	X		
Supervise	X		
Interpret Data			X
Organize			X
Write		X	
Plan		X	
Multi-Task			X

Equipment Use:	Rarely(0 – 1.5 HPD)	Occasionally (1.5 – 3 HPD)	Frequently (3 – 6 HPD)
Telephone			X
Copier		X	
Computer			X
FAX Machine	X		
Radio	X		