

INSURANCE TECHNICIAN  
SENIOR INSURANCE TECHNICIAN

2775  
2781

## DEFINITION

Applies pertinent rules and regulations in processing claims and providing information to employees regarding eligibility; enrollment; maintenance of health and welfare benefits; and the status of reasonable accommodations, contracts, and liability and unemployment compensation claims.

## TYPICAL DUTIES

Provides information to employees, retirees, and various outside agencies regarding claims status, health and welfare benefits, reasonable accommodations, union and insurance contracts, payment schedules, billing procedures, and eligibility requirements.

Researches, interprets, and explains rules, regulations, policies, and procedures that pertain to various areas such as employee eligibility, employee reimbursement programs, reasonable accommodations, and insurance claims.

Analyzes reports, advises concerned parties, and resolves discrepancies regarding status of benefits and claims.

Reviews various claims and forms, determines timelines and claimant eligibility, notifies claimants of case results, and establishes case files.

Scans, enters, updates, and files certificates of insurance for professional services or facilities services contracts.

Composes reasonable accommodation decision and maintenance letters.

Follows up with employees and supervisors and ensures reasonable accommodations are implemented and effective.

Arranges for the appearance of District employees and witnesses at various proceedings.

Contacts various District employees and outside agencies to obtain information and arranges for affidavits in lieu of appearance.

Reconciles and verifies employee enrollment, insurance carrier membership reports, and dependency data.

Maintains electronic records of employee and retiree benefits information, prepares reports, and composes correspondence.

Performs related duties as assigned.

## DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

An Insurance Technician applies detailed knowledge of District rules, policies, procedures, programs, and contracts in processing insurance claims and maintaining and updating records regarding employee health and welfare benefits, contracts, reasonable accommodations, and liability and unemployment compensation claims.

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, and liability claims. Positions in this classification may have assigned specialty areas.

A Supervising Insurance Technician supervises and reviews the work of lower-level employees involved in maintaining employee and retiree insurance plans, participates in the work of the unit, and performs and responds to the more difficult work and problems.

## SUPERVISION

General supervision is received from a higher level supervisory employee. Work direction may be exercised over lower-level technical clerical staff, as assigned. A Senior Insurance Technician may provide work direction to Insurance Technicians and/or lower-level technical clerical staff.

## CLASS QUALIFICATIONS

### Knowledge of:

- Health and welfare benefits programs available to employees of and retirees from public agencies
- Board of Education and Personnel Commission rules, policies, and procedures as they relate to employee reimbursement programs and the filing of liability claims
- Provisions of labor contracts that pertain to various health and welfare 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
- Terminology used in property, casualty, and self insurance programs
- Office practices and procedures
- Eligibility, enrollment, and conversion requirements as applied by the District and its various benefits plans
- Premiums and schedules required for various insurance "direct billing" plans
- Reasonable accommodation guidelines

### 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
- Compile and summarize data and prepare reports
- Understand, interpret, apply, and explain rules, policies, and procedures necessary for filing liability and unemployment insurance claims or for enrolling in, maintaining, or converting District benefits
- 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
- Operate various office machines

## ENTRANCE QUALIFICATIONS

### Education:

Graduation from high school or evidence of equivalent educational proficiency, preferably supplemented by courses in business English and arithmetic, report writing, legal terminology, and computer usage.

For Senior Insurance Technician, courses in human relations are highly preferable.

Experience:

Insurance Technician

One year of clerical experience interpreting, applying, and explaining payroll or personnel codes or District policies and rules regarding legal or insurance data.

Senior Insurance Technician

Two years of experience interpreting, applying, and explaining payroll, personnel, legal, or insurance policies and procedures.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and/or abilities. Management retains the discretion to add or change typical duties of a position at any time.

Revised and Re-titled  
06-24-10  
JPK

Reviewed  
05-06-20  
CA