

# Client Associate I

Act as the main point of contact for clients (employees and local human resources representatives) for issues relating to benefit administration. Perform the administration relating to agreed upon benefit administration services.

## Responsibilities

- Support service center functions and client administration work
- Support all client work within or outside of client team as directed by Client Team Lead/Manager/Director
- Act as back up for other Client Associates
- Adhere to peer review process
- Special projects as assigned

## Service Center Functions

- Answer phone calls from employees regarding benefit information, benefit enrollment, eligibility questions, benefit claims and other miscellaneous questions
- Process telephone enrollments
- Update Notes section of benefits administration platform to document the call
- Enter call information in Call Tracking System
- Answer emails from employees regarding benefit information, benefit enrollment, eligibility questions, benefit claims and other miscellaneous questions
- Respond to claim issues and assist employees with requests for information

## Administration Project Work - Active Benefits

- Process Status Changes through Online Enrollment and Paper Form
- Process Online Enrollments through Employee Self Service
- Enter Paper Enrollment Forms into Employee System
- Generate and Mail Personalized Confirmation Statements weekly
- Perform Quality Audits
- Generate client report in Employee system
- Process carrier connection eligibility error files
- Administer EOI according to client process
- Administer monthly and annual FTS solicitations based upon client agreement
- Manage all client team fulfillment requests
- Process client court orders

## **Administration Project Work - COBRA**

- Process COBRA Data Entry
- Prepare and Mail COBRA Qualifying Event Letters
- Prepare and Mail Initial Notice of COBRA Rights
- Enter COBRA Elections into COBRA System
- Enter COBRA Checks into COBRA System
- Prepare COBRA Transmittal Documents and Send along with checks to clients
- Process COBRA daily, mail letters and payment coupons when necessary
- Respond to telephone and e-mail inquiries relating to COBRA administration
- Add and terminate COBRA participants from carrier eligibility systems
- Prepare Weekly/Monthly COBRA Reports
- Provide monthly billing information to EBS Accounting Department (COBRA, Retiree, Direct Bill)
- Prepare mail, update proof of mailing log and take mail to post office daily
- Review and load COBRA data files daily
- Process Direct Bill file on weekly/bi-weekly basis

- Process Data entry of Direct Bill information
- Prepare and mail direct bill invoice
- Process Direct Bill Checks
- Prepare and send Direct Bill Check Log to client on a weekly basis
- Prepare Direct Bill Paid Through Reports Weekly
- Coordinate Direct Bill Information with Clients
- Prepare Direct Bill Termination reporting
- Respond via phone and email to Direct Bill inquiries
- Process Retiree Billing on a weekly/bi-weekly basis
- Data entry of Retiree information
- Prepare and mail Retiree invoices
- Process Retiree Checks
- Prepare and send Paid Through reports
- Prepare and Send Check Logs to Client on a weekly basis
- Coordinate Retiree Direct Bill information on a weekly basis
- Respond via telephone to Retiree Inquiries
- Adhere to peer review process
- Special projects as assigned

## **Requirements**

- High School graduate
- 2 years Benefits Administration experience
- 2 years Customer Service experience
- Intermediate Word, Excel, Travis COBRA, Travis TBill, Employease
- Able to multi-task, prioritize, and be flexible
- Detail oriented
- Excellent written/verbal communication skills
- Fluent in Spanish a plus (written/verbal)
- Knowledge of COBRA Regulations and Administration
- Mandatory Overtime as needed and during peak times (includes evenings and weekends)
- Organized and efficient
- Team player