|  |  |
| --- | --- |
| **POSITION** | Benefits Specialist |
| **DEPARTMENT** | Client Services |
| **REPORTS TO** | Manager, Client Services |

|  |
| --- |
| **Description of Position** |
| Responsible to provide benefits-related services for clients, in direct response to client requests and in support of Johnstone’s Benefits’ value-added service model, and provide direct support to Client Account Management team. |
| **Responsibilities** |
| * Support services for Client Account Managers including periodic re-marketing, preparing annual renewals, data analysis and reports * Coordinate client plan changes, review and processing of client policies and amendments; work closely with Benefits Administrator to ensure system changes re: amendments, plan changes, change of carriers, renewals, etc. are complete * Manage prospects data and proposals as part of the business development initiatives * Support account management team responsible for high touch client services supporting Johnstone’s Benefits’ services * Prepare and maintain employee booklets and communications for new and existing clients * Liaise with employees and retirees, and insurers regarding group benefits and claims enquiries * Provide conversion support for Client Account Manager * Maintain internal reports and lists reflecting client services * Support team and workflow in acting as a resource for peer review * Manage the set up new clients, includes coordinating group application(s), welcome packages, communicating to insurer(s) and client, etc. * Manage processes for terminated groups * Manage disability, life insurance, CI, and AD&D claims and waivers * Manage data exchanges between Bridge, insurers and other systems as required * Support team and workflow in acting as a resource for peer review * Understand employer HR issues as they relate to benefits * Other duties as required to ensure optimal service levels are experienced by Johnstone’s Benefits clients |
| **Education & Experience** |
| **Required**   * Two years of group benefits experience * Two years of experience with client service, administration and/or communications   **Preferred**   * Related courses in group benefits (CEBS or GBA); and interest in further developing knowledge in group benefits |
| **Competencies** |
| * Exceptional customer focus, with the ability to proactively look for alternate solutions * Dedicated team player, who demonstrates initiative, independence and problem solving * Excellent interpersonal and communication skills – verbal, written and listening – and the ability to effectively communicate at all employee levels and with insurers * Strong organizational and time management skills, with the ability to multi-task easily and prioritize to meet deadlines * Critical thinker, good analytical skills * Understand life, disability and health care plan designs, and the basics of benefit cost factors and the renewal process * Good understanding of PC’s and software, with capabilities specific with MS Word, Excel, PowerPoint |
| **Direct Reports** |
| None |