



Department: Employee Benefits

FLSA Status: Non-Exempt

Work Schedule:
M—F 8:30am—5:00pm

Job Status: Full Time

Reports to: Jodie Sherwood

Amount of Travel Required: 10%

Positions Supervised: None

POSITION SUMMARY

Responsible for timely and accurate administration of Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs), including the Debit Card Program, as well as providing consultation and proactive client management services. Also responsible for representing our agency in a manner consistent with our Core Values and making Kapnick the best in our business.

ESSENTIAL FUNCTIONS

Reasonable Accommodations Statement

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable Accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Essential Functions Statement(s)

- Provide timely and accurate consultative assistance to internal and external FSA and HRA clients during all staged of the business relationship, including onboarding, renewal, ongoing management, and termination.
- Issue prompt and thorough responses, after investigation when necessary, to all client inquiries.
- Assist client service teams with FSA and HRA inquiries as needed, issuing responses in a timely manner.
- Provide timely responses to all FSA and HRA participants who submit inquiries via email, direct call, or telephone inquiries escalated by the call center.
- Document all correspondence and coverage inquiries in the agency management system.
- Assist Department Manager with the overall administration of applicable sites used for administration.
- Attend and participate in department meetings, team meetings, and training sessions as required.
- Continuously analyze processes and procedures to identify efficiencies and enhancements.
- Manage implementation of FSA and HRA services for client, including conducting implementation calls and client training.
- Build, renew, and terminate FSA and HRA plans in the claims system, including gathering of necessary information and documentations (i.e., banking paperwork, payroll calendars, etc.).
- Issue educational information to participants regarding their plan, including access and permissible use.
- Upload enrollments, termination, and approved mid-year changes; manual entry may be required to perform this function in certain instances.
- Review for accuracy and process all employer FSA and HRA contribution registers (and checks received in the

Administrative Services Department, when applicable).

- Provide Open Enrollment Account Summary reporting to all clients and issue other reporting as requested.
- Review for accuracy and process all submitted FSA and HRA claims within 3 business days following receipt, issuing any resulting payment in the method selected by the participant.
- Ensure any documentation requests or claims denials are properly explained in the information issued to participants and assist them with inquiries regarding the same in a timely manner.
- Initiate funding to participants and funding pulls from correct employer accounts on a daily basis.
- Direct control over daily release of FSA and HRA manual claims for payment and Debit Card transactions.
- Maintain data integrity within the FSA and HRA system.
- Responsible for the review and processing of the year end forfeiture letters to employees
- Perform your job in such a manner that other employees will consider it a pleasure and privilege to work with you.
- Regular and timely attendance is an essential function of the job.
- Other duties and responsibilities as assigned by the Team Lead, or department SVP.

POSITION QUALIFICATIONS

Competency Statement(s)

- Accuracy - Ability to perform work accurately and thoroughly.
- Accountability - Ability to accept responsibility and account for his/her actions.
- Analytical Skills - Ability to use thinking and reasoning to solve a problem.
- Communication - Ability to communicate effectively with others using the spoken and written word.
- Confidentiality - Ability to maintain strict confidentiality in accordance with Kapnick privacy guidelines including but not limited to HIPAA/HITECH as it relates to all divisions of Kapnick Insurance.
- Customer Oriented - Ability to take care of the customers' needs while following company procedures.
- Ethical - Ability to demonstrate conduct conforming to a set of values and accepted standards.
- Empathetic - Ability to appreciate and be sensitive to the feelings of others.
- Energetic - Ability to work at a sustained pace and produce quality work.
- Honesty/Integrity - Ability to be truthful and be seen as credible in the workplace.
- Interpersonal - Ability to get along well with a variety of personalities and individuals.
- Organized - Possessing the trait of being organized or following a systematic method of performing a task.
- Research Skills - Ability to design and conduct a systematic, objective, and critical investigation.
- Self-Motivated - Ability to be internally inspired to perform a task to the best of one's ability using his or her own drive or initiative.
- Time Management - Ability to utilize the available time to organize and complete work within given deadlines.
- Working Under Pressure - Ability to complete assigned tasks in stressful situations.

SKILLS & ABILITIES

- Education:** High School Graduate or General Education Degree (GED) Required
- Experience:** 3-5 years' experience in group benefits required; 1-3 years' FSA and/or HRA experience required; Experience with Wex preferred
- Computer Skills:** Intermediate skill level in Microsoft (Word, Excel, Outlook, PowerPoint, Teams) required; Knowledge regarding Evolution Benefits/Wex preferred
- Certifications & Licenses:** Life and Health License preferred
- Other Requirements:** Overtime is expected when required, especially during peak season

PHYSICAL DEMANDS

- N (Not Applicable)** Activity is not applicable to this position.
- O (Occasionally)** Position requires this activity up to 33% of the time (0 - 2.5+ hrs/day)
- F (Frequently)** Position requires this activity from 33% - 66% of the time (2.5 - 5.5+ hrs/day)
- C (Constantly)** Position requires this activity more than 66% of the time (5.5+ hrs/day)

Physical Demands

Sit	C
Speak	F
Lift/Carry	N
Push/Pull	N

WORK ENVIRONMENT

This is an office environment in a controlled atmosphere building.

Prepared By: _____ Date: _____

Approval: _____ Date: _____

Employee Signature: _____ Date: _____

Employee Printed Name: _____ Date: _____

The company has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the employee's ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills and abilities. Additional functions and requirements may be assigned by managers as deemed appropriate. This document does not represent a contract of employment, and the company reserves the right to change this job description and/or assign tasks for the employee to perform, as the company may deem appropriate.

Revised 04/26/2023