



Position Description

Title:	Benefits Advocate
Reports to:	Team Leader, Benefits Advocacy

Purpose of position:

Partner with clients and clients' employees to provide white glove concierge service related to navigating healthcare benefits and claim questions and issues, focusing on education and timely resolution.

Relationships:

Clients, Carrier/Vendor Partners, Employees

Essential Duties and Responsibilities:

1. Work directly with clients and clients' employees to resolve a variety of benefits administration issues including confirming eligibility, describing benefit offerings and handling escalated claims.
2. Provide the highest level of customer care to every client including proactive follow up, dependability and follow through to completion.
3. Partner with Employee Benefits Consulting team to build relationships with clients and keep team informed of key questions and issues.
4. Communicate with fellow Benefits Advocates to collaborate on client resolution, provide guidance for claims issues and request support when needed.
5. Regularly enter and track pertinent client information and service request details into the Agency Management System.
6. Follow up with clients and share status of claims on a regular basis. Create reports for clients when requested.
7. Form and maintain strong relationships with industry carrier service teams to maximize service to clients.
8. Attend client meetings, open enrollment sessions and benefit fairs as needed to meet face to face with employees.
9. Attend prospect meetings as needed to present the Benefits Advocacy platform.

Position Requirements (knowledge, skills and abilities required to perform satisfactorily in the position):

- A bachelor's degree from an accredited university and at least one to two years of customer service or human resources experience or a high school diploma and at least three to five years of customer service or human resources experience.
- Experience working in the health insurance industry required. Experience with health insurance carriers or brokerage firms preferred.
- Experience working in a database system strongly preferred.
- Strong attention to detail and follow through required.
- Must possess excellent listening skills.
- Superior client service skills, including the ability to be compassionate to client concerns.
- Working knowledge of Microsoft Office including Word and Excel.
- Prefer bilingual candidates fluent in Spanish.
- Strong organizational skills.
- Excellent written and verbal communication skills required.
- Ability to multi-task and handle multiple projects with deadlines at the same time.
- Ability to work quickly and accurately.
- The ability to remain calm and patient under pressure or compressed deadline.
- Ability to work as a team member, externally and internally.
- Regular and reliable attendance required.
- Willingness to do what it takes to serve the client through resolve of issue, including follow through.

Physical Demands:

- Position requires sitting at a desk working on a computer for at least 2/3 of time.
- Position requires minimal lifting up to 25 lbs.
- Position requires proficiency in English and grammar usage skills.
- Position requires occasional travel (15 to 20% of the time).

By my signature below, I acknowledge that I understand the accountabilities of the role and that my performance will be evaluated based on my success in achieving the goals set out in the position. I also acknowledge that my job description may change due to changing company needs or environment and that my accountabilities may be changed or added to during the course of my employment.

Employee Name

Date