

Job Family Matrix

Job Function: Human Resources	Job Family: HR Benefits - Professional
Job Family Summary: Provide University wide benefit program oversight; design, analyze and administer services to ensure compliant and effective programs are available to the University community. Provide benefits training and education programs to ensure high quality service and customer satisfaction.	
Job Title: HR Benefits Consultant II	Job Title: HR Benefits Consultant III
Job Code: H0056P	Job Code: H0057P
Grade Level: 56 Exemption: Exempt	Grade Level: 57 Exemption: Exempt
Effective/Revision Date: April 2018	Effective/Revision Date: April 2018
Job Summary	
Represent the benefits office to local human resources and faculty affairs. Build strategic partnerships with schools and departments to ensure smooth benefits administration and outreach program delivery. Provide benefits counseling and respond to and resolve benefits inquiries.	Serve as benefits liaison to schools or unit, local Human Resources, and Faculty Affairs to ensure accurate and timely administration of benefits programs and associated processes. Provide benefits counseling and respond to and resolve benefits inquiries.
Core Duties	
<ul style="list-style-type: none"> • Provide high quality and professional retirement and executive counseling for current and former faculty and staff members as well as prospective hires, as requested, ensuring full follow-through on all efforts • Manage complex cases and respond to questions from faculty, staff and human resources • Serve as a direct liaison to local human resources and faculty affairs building strong strategic partnerships that are mutually beneficial, and provide education on employee benefit initiatives and practices • Participate in and present various outreach programs to faculty and staff in support of employee benefit programs • Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	<ul style="list-style-type: none"> • Apply subject matter expertise to administer benefits programs and resolve employee benefits questions/issues • Deliver retirement and executive counseling for former, current, and prospective faculty and staff members • Collaborate with local Human Resources and Faculty Affairs personnel to ensure each school's benefits related objectives are obtainable • Act as a resource and coach for Benefits Representatives regarding best practices in benefits administration and customer service • May develop, implement, and maintain robust benefits educational products, including training and seminars; provide education to faculty and staff on employee benefit initiatives and practices for current offerings • Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations

Job Family Matrix

Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> • Bachelor's degree or equivalent experience required • Minimum of 3 years' relevant benefits experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 5 years' relevant benefits experience
Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, especially Excel • Advanced knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a) 	<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, advanced Excel skills • Advanced knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a)
Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements
Working Conditions	Working Conditions
<ul style="list-style-type: none"> • Work is performed in an office setting 	<ul style="list-style-type: none"> • Work is performed in an office setting

Job Family Matrix

Job Function: Human Resources		Job Family: HR Benefits - Professional	
Job Family Summary: Provide University wide benefit program oversight; design, analyze and administer services to ensure compliant and effective programs are available to the University community. Provide benefits training and education programs to ensure high quality service and customer satisfaction.			
Job Title: HR Benefits Analyst II		Job Title: HR Benefits Analyst III	
Job Code: H0156P		Job Code: H0157P	
Grade Level: 56 Exemption: Exempt		Grade Level: 57 Exemption: Exempt	
Effective/Revision Date: April 2018		Effective/Revision Date: April 2018	
Job Summary		Job Summary	
Provide analytical support to collect, analyze and interpret data to ensure that the benefit program administration is in compliance with plan and contract provisions. Identify cost trends and opportunities for plan design modifications and process improvements.		Responsible for analysis and administration of benefit programs(s). Manage vendor relationships and identify opportunities for plan improvements and cost savings.	
Core Duties		Core Duties	
<ul style="list-style-type: none"> Provide detailed information to the HU community about health and welfare plans, pension plans and calculations, tax deferred annuities, life insurance options, and/or disabilities programs Review and analyze vendor reports and PeopleSoft data to ensure that the current benefit programs are in compliance with plan and contract provisions Collect and interpret program level utilization and claims data trends to identify cost trends and opportunities for plan design modifications and/or process improvements Provide support for other compliance and non-discrimination testing Assist in the development of new processes and procedures to improve efficiency both internally and with vendor partners Collaborate with other Health and Welfare analysts on the development of implementation action plans Coordinate vendor management activities, which include hosting regular service meetings, maintaining a log of issues and working with the vendor to ensure timely resolution of problems Conduct competitive benefits analyses and cost projections Act as a key participant on the Open Enrollment Team and conduct internal benefits training and orientations Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 		<ul style="list-style-type: none"> Administer and review benefit programs(s); develop, document and implement all administrative processes and procedures and provide input to plan changes Serve as vendor manager for select benefit programs; facilitate meetings, review and approve invoices, manage claims processes, etc. Review and analyze reports, identify trends and ways to reduce claims; recommend plan improvements and cost savings Assist employees with benefits program(s) including claims processing and customer service issues Identify trends in customer service inquires and develop processes to address and mitigate concerns Develop and foster relationships with local HR and Faculty Affairs staff to ensure benefit programs are administered appropriately Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	
		<ul style="list-style-type: none"> Develop and maintain data integrity procedures including an audit strategy, issue research and resolution and root cause mitigation Ensure all file transmissions to vendors and internal customers are monitored for accuracy; identify and correct errors Manage root cause and trend analysis in order to minimize large scale problems; identify critical errors and report to senior management Provide subject matter expertise to benefits consultants on complex retirement plan questions and issue resolution Serve as compliance and benefits liaison to Central Finance and Retirement Investment Committees in plan design and strategy Create action plans and processes to ensure programs are administered fairly, consistently and accurately Lead new benefit plan implementations; identify teams and tasks, develop timeline and communications Establish and monitor effective and relevant metrics; develop and produce reports Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	

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Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> • Bachelor's degree or equivalent experience required • Minimum of 3 years' relevant benefits experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent experience required • Minimum of 5 years' relevant benefits experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 7 years' relevant benefits experience
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, especially Excel • Working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) 	<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, advanced Excel skills • Strong working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a) 	<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, advanced Excel skills • Strong working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a) • Knowledge of PeopleSoft preferred
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
Working Conditions	Working Conditions	Working Conditions
<ul style="list-style-type: none"> • Work is performed in an office setting 	<ul style="list-style-type: none"> • Work is performed in an office setting 	<ul style="list-style-type: none"> • Work is performed in an office setting

Job Family Matrix

Job Function: Human Resources		Job Family: HR Benefits - Management	
Job Family Summary: Provide University wide benefit program oversight; design, analyze and administer services to ensure compliant and effective programs are available to the University community. Provide benefits training and education programs to ensure high quality service and customer satisfaction.			
Job Title: HR Benefits Consulting Mgt II		Job Title: HR Benefits Consulting Mgt IV	
Job Code: H0056M		Job Code: H0058M	
Grade Level: 56 Exemption: Exempt		Grade Level: 58 Exemption: Exempt	
Effective/Revision Date: April 2018		Effective/Revision Date: April 2018	
Job Summary		Job Summary	
Oversee the benefit services center operations to ensure timely and satisfactory customer service support provided to employees, faculty and retirees related to benefit plan enrollment, utilization, and related plan administration issues.		Manage and deliver benefits training programs to clients and staff. Ensure high standards of customer service and client satisfaction. Act as a resource on benefits projects, compliance efforts and client services.	
Core Duties		Core Duties	
<ul style="list-style-type: none"> Responsible for effective staff management for a group or team of employees, including hiring and orientation, training and development; workflow and performance management, and the promotion of an inclusive and innovative work environment Communicate with a variety of secondary sources (vendors, attorneys, etc.) to research issues and obtain specialized information for second tier problem resolution Collect and interpret service center utilization data trends to identify opportunities for modifications and/or process improvements Assist in the development of new processes and procedures to improve efficiency both internally and with vendor partners Assist senior benefits consultants with special projects including vendor reviews and plan design Serve as escalation point for benefit representatives on complicated customer service issues Coordinate vendor management activities, which include hosting regular service meetings, maintaining a log of issues and working with the vendor to ensure timely resolution of problems Act as a key participant on the Open Enrollment Team and conduct internal benefits training Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 		<ul style="list-style-type: none"> Responsible for effective staff management for a group or team of employees, including hiring and orientation, training and development; workflow and performance management, and the promotion of an inclusive and innovative work environment Train staff on changes to benefits programs and ensure processes and procedures are implemented correctly Serve as escalation point for benefit representatives on complicated customer service issues Provide training and education on benefits programs to clients; counsel employees regarding benefits Market programs to the community Ensure programs are compliant with applicable laws and regulations, research and implement changes to keep programs in compliance Develop and manage benefits projects; identify resources, create projects plans, schedules and communications Monitor performance of providers; ensure plan administration is efficient and cost-effective Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	
		<ul style="list-style-type: none"> Responsible for effective staff management for a group or team of employees, including hiring and orientation, training and development; workflow and performance management, and the promotion of an inclusive and innovative work environment Direct the overall administration of benefits training programs and seminars Promote customer satisfaction and develop and implement standards for high quality services Identify and develop PeopleSoft reports to meet requests for benefits related information Develop metrics and evaluate ongoing vendor performance; ensure optimal service and cost effectiveness Evaluate and update current policies and procedures or develop and implement new policies; develop and lead strategic plan to deliver and implement program changes Ensure all benefits communications and training is accurate and timely delivered to the service center personnel Ensure customer contact is effective and ensure escalation is minimized Establish and maintain strong professional relationships at all levels of the organization Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	

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Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 3 years' relevant benefits experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 7 years' relevant benefits experience • Supervisory experience 	<ul style="list-style-type: none"> • Master's degree or equivalent work experience required • Minimum of 10 years' relevant benefits experience • Supervisory experience
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> • Supervisory experience • Microsoft Office Suite, especially Excel • Working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA), is preferred 	<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, advanced Excel skills • Strong working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a) • Knowledge of PeopleSoft preferred 	<ul style="list-style-type: none"> • Advanced knowledge of Microsoft Office Suite • Advanced knowledge of HU policies, benefit plans, programs, and applicable laws • Advanced knowledge of Pension Protection Act and ERISA
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
Working Conditions	Working Conditions	Working Conditions
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Job Family Summary: Provide University wide benefit program oversight; design, analyze and administer services to ensure compliant and effective programs are available to the University community. Provide benefits training and education programs to ensure high quality service and customer satisfaction.			
Job Title: HR Benefits Analysis Mgt III		Job Title: HR Benefits Analysis Mgt IV	
Job Code: H0157M		Job Code: H0158M	
Grade Level: 57 Exemption: Exempt		Grade Level: 58 Exemption: Exempt	
Effective/Revision Date: April 2018		Effective/Revision Date: April 2018	
Job Summary		Job Summary	
Manage the administration of benefit programs(s) and vendor relations. Analyze programs and identify opportunities for plan improvements and cost savings.		Oversee day to day operation of all benefits administration including data monitoring, file transmission, data entry and record retention. Ensure high levels of transaction accuracy and data integrity.	
Core Duties		Core Duties	
<ul style="list-style-type: none"> Responsible for effective staff management for a group or team of employees, including hiring and orientation, training and development; workflow and performance management, and the promotion of an inclusive and innovative work environment Administer and review benefit programs(s); develop, document and implement all administrative processes and procedures and provide input to plan changes Serve as vendor manager for select benefit programs; facilitate meetings, review and approve invoices, manage claims processes, etc. Review and analyze reports, identify trends and ways to reduce claims; recommend plan improvements and cost savings Assist employees with benefits program(s) including claims processing and customer service issues Identify trends in customer service inquires and develop processes to address and mitigate concerns Develop and foster relationships with local HR and Faculty Affairs staff to ensure benefit programs are administered appropriately Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 		<ul style="list-style-type: none"> Responsible for effective staff management for a group or team of employees, including hiring and orientation, training and development; workflow and performance management, and the promotion of an inclusive and innovative work environment Develop and maintain data integrity procedures including an audit strategy, issue research and resolution and root cause mitigation Ensure all file transmissions to vendors and internal customers are monitored for accuracy; identify and correct errors Manage root cause and trend analysis in order to minimize large scale problems; identify critical errors and report to senior management Create action plans and processes to ensure programs are administered fairly, consistently and accurately Lead new benefit plan implementations; identify teams and tasks, develop timeline and communications Establish and monitor effective and relevant metrics; develop and produce reports Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	
		<ul style="list-style-type: none"> Responsible for effective staff management for a group or team of employees, including hiring and orientation, training and development; workflow and performance management, and the promotion of an inclusive and innovative work environment Participate in the design of benefit plans and provide overall program management including data analysis, committee presentations, implementation, administration and vendor management Ensure programs are competitive, cost-contained and of high quality by monitoring industry trends in the workforce marketplace Create administration policies, processes, customer services and procedures to ensure programs are administered fairly, consistently, accurately and in compliance with government regulations Select, monitor and evaluate third-party vendors and service providers to ensure programs are managed by high-quality, financially sound organizations; manage data issues, vendor projects, customer service, compliance and overall service level reporting Provide consulting advice and counsel to senior management on plan issues, changes and improvements in benefits programs Collaborate with Benefits Finance to project and manage the cost of benefits plans within budget Ensure compliance with University Human Resources policies, procedures, and requirements and applicable legal regulations 	

Job Family Matrix

Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 5 years' relevant benefits experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 7 years' relevant benefits experience • Supervisory experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 8 years' relevant benefits experience • Supervisory experience
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> • Supervisory experience • Knowledge of Microsoft Office Suite, especially Excel • Strong working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a), is preferred 	<ul style="list-style-type: none"> • Knowledge of Microsoft Office Suite, advanced Excel skills • Strong working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a) • Knowledge of PeopleSoft preferred 	<ul style="list-style-type: none"> • Advanced knowledge of Microsoft Office Suite • Strong working knowledge of applicable federal and state laws, regulations and guidelines, including the Employee Retirement Income Security Act (ERISA) and IRS Sections 125, 403(b), 457(b) and 401(a), is preferred • Knowledge of PeopleSoft preferred
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
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