

FRESNO UNIFIED SCHOOL DISTRICT  
Position Description

<b>TITLE:</b>	Disability/Retirement Technician	<b>REPORTS TO:</b>	Assigned Supervisor
<b>DEPARTMENT:</b>	Benefits & Risk Management	<b>CLASSIFICATION:</b>	Classified
<b>FLSA:</b>	Non-exempt	<b>WORK YEAR:</b>	Varies
<b>BOARD APPROVAL:</b>	June 17, 2020	<b>SALARY:</b>	G-37/CSEA 125 Salary Schedule

**BASIC FUNCTION:**

Under the general direction of an assigned supervisor, perform complex, varied and technical duties in support of short and long-term disability and retirement applications; organize and prepare comprehensive and complex reports as required; coordinate all activities with Workers' Compensation and Human Resources personnel to provide reasonable, timely delivery of professional services.

**REPRESENTATIVE DUTIES: (Incumbents may perform any combination of the essential functions shown below. This position description is not intended to be an exhaustive list of all duties, knowledge, or abilities associated with this classification, but is intended to accurately reflect the principal job elements.)**

Perform varied and technical duties relation to short and long-term disability and retirement applications; compile information from a variety of sources; prepare accurate complex reports as required by District, County, State or Federal regulations. *E*

Assist in the preparation and monitoring of disability management programs designed to return employees to work; track sick leave to identify employees who need assistance and follow-up with employees in a reasonable, timely manner to provide accurate information regarding programs and services. *E*

Perform a variety of duties requiring independent judgment and initiative; assist employees with disability claim issues and retirement benefit information. *E*

Receive calls; exercise judgment to determine importance or urgency; provide information or direct inquiries to appropriate personnel in a reasonable, timely manner to meet the needs of the callers. *E*

Respond to requests from District personnel and process employee inquiries and status changes related to disability programs, COBRA, benefits eligibility status, Medicare, or retiree agreements. *E*

Compose correspondence independently; prepare letters, memoranda and forms; and duplicate a variety of documents. *E*

Maintain financial and statistical records as required to ensure the financial viability of the District; provide information to others and serve as a resource for disability management programs, light or modified duty assignments, and other assigned programs. *E*

Receive, screen and distribute mail; install and revise filing systems and other procedures; verify eligibility and coverage information. *E*

Attend new employee orientations and disseminate District benefit information to small or large groups as required. Answer questions as appropriate. *E*

Attend Benefit Department workshops for employees (actives and/or retiree) as required and explain District benefit information, policies and procedures to members in attendance. Answer questions as appropriate. *E*

Update District benefit department forms, including Retiree forms, Special Enrollment forms, Open Enrollment forms, Consolidated Omnibus Budget Reconciliation Act (COBRA) forms and other forms as required on a monthly, quarterly and annual basis; order appropriate Benefit Department forms and vendor brochures as required to ensure day-to-day activities can be performed without interruption. *E*

Communicate with applicable eligibility vendors via telephone, email, and/or vendor-specific eligibility system(s) to ensure employee, spouse and dependent(s) eligibility records are accurate and up to date in both the District's eligibility system and applicable vendor eligibility system(s); troubleshoot discrepancies as necessary. *E*

Aide management in testing patches and updates to eligibility information systems on an as-needed basis; help test day-to-day scenarios to ensure patches and updates to eligibility information system function per functional specification requirements. *E*

Maintain a current understanding of the Health Insurance Portability and Accountability Act of 1996 (HIPPA) to ensure proper and adequate safeguarding of individuals' protected health information (PHI). *E*

Perform related duties as assigned.

**EDUCATION AND EXPERIENCE:**

Any combination equivalent to: graduation from high school with two years college level

course work in human resources or related field and three years of increasingly responsible experience in benefits, workers' compensation, or a related field.

**LICENSES AND OTHER REQUIREMENTS:**

Valid California driver's license.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**

Benefits programs, workers' compensation regulations, and disability programs.  
Operation of office machines including computer equipment and related software.  
Payroll policies and procedures including deductions for various benefit programs.  
Current office practices, procedures and equipment.  
Accurate record-keeping techniques.  
Correct English usage, grammar, spelling, punctuation and vocabulary.  
Telephone techniques and etiquette.  
Oral and written communication skills.  
Policies and objectives of assigned program and activities.  
Interpersonal skills using tact, patience and courtesy.

**ABILITY TO:**

Perform complex, varied and technical duties.  
Organize and prepare comprehensive and complex reports.  
Assemble, organize and prepare data for records and reports.  
Answer phones and greet the public courteously.  
Operate a computer to enter data, maintain records and generate reports.  
Establish and maintain cooperative and effective working relationships with a diverse range of people.  
Read, interpret, apply and explain rules, regulations, policies and procedures.  
Determine appropriate action within clearly defined guidelines.  
Understand and work within scope of authority.  
Work independently with little direction.  
Complete work with many interruptions.  
Communicate, understand and follow both oral and written directions effectively.  
Learn new or updated computer systems/programs to apply to current work.  
Communicate using patience and courtesy in a manner that reflects positively on the organization.  
Actively participate in meeting District goals and outcomes.  
Apply integrity and trust in all situations.  
Learn District organization, operations, policies, objectives and goals.

**WORKING CONDITIONS:**

ENVIRONMENT:

Office environment; constant interruptions; contact with dissatisfied individuals.

PHYSICAL ABILITIES:

With reasonable accommodations, if necessary, sitting for extended periods of time; dexterity to operate a computer and other office equipment; reaching overhead, above the shoulders and horizontally and bending at the waist to retrieve files and storage materials; hearing and speaking to exchange information in person or on the phone; seeing to read a variety of materials.

Fresno Unified School District is an Equal Opportunity Employer and reasonable accommodations are made under the Americans with Disability Act as required by law.

***E = Essential Functions***