



Position Description

JOB TITLE:	Account/ Benefit Coordinator
DEPARTMENT:	Client Services
LOCATION:	Independence, OH
REPORTS TO:	Director of Operations
FLSA STATUS:	Exempt

Revision: ■ January 2022

Position Summary: This is a support role, assisting the account & sales teams with basic administrative and other support functions in the team's day-to-day servicing of clients. The account / benefits coordinator will aid in the sales presentations, client implementations, client support meetings, marketing, and participate in special projects.

MAJOR RESPONSIBILITIES:

- Will have direct contact with vendors for simple questions or requests
- Assists in answering administrative questions from clients
- Creates and maintain client files in accordance with office procedures.
- Learn to implement and support clients on their benefit communication portal
- Prep for client meetings. Create meeting agendas, marketing documents, PowerPoints, and more.
- Assist in coordinating communication packets
- Assists Account Managers with implementation of new business as directed by the Manager
- Assists with problem resolution on billing and eligibility issues.
- Create and maintain files and client data; maintain client data Salesforce, as directed by Director of Operations.
- Assist Account Managers, Specialists, and others in the office with administrative duties.
- Participate in training regarding products and systems

JOB REQUIREMENTS & QUALIFICATIONS:

EDUCATION & EXPERIENCE:

- High School graduate or equivalent
- 0-2 years related experience and/or training; or equivalent combination of education and experience.

SPECIAL SKILLS REQUIRED:

- Knowledge of benefits administration, industry trends, vendor products and services
- Strong customer service knowledge
- Ability to work independently and anticipate client and team needs
- Effective time management and decision-making skills
- Diligent follow up skills

- Ability to express ideas clearly in both written and oral communications
- Strong Microsoft Excel and PowerPoint skills

COMPUTER SKILLS:

- To perform this job successfully, individual should have knowledge of Microsoft Word, Microsoft Excel spreadsheet, Microsoft Access, Power Point design software, and Salesforce.com experience preferred.

SUPERVISORY RESPONSIBILITIES: None

CERTIFICATES, LICENSES, REGISTRATION: None

PHYSICAL DEMAND: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations maybe made to enable individuals with disabilities to perform the essential functions.

- Ability to sit at a computer for long periods of time and use a telephone frequently
- Standing, walking, talking, hearing, sitting, reaching
- Lifting up to 25 lbs. occasionally; lifting up to 10 lbs. regularly

WORKING CONDITIONS: Position will allow for a split between being in the HQ office and flexibility to work remote.

NOTE: *The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.*

Employee's Signature

Date

Director of Operations Signature

Date