



## Position Description

**Title:** Benefits Advocate

**Reports to:** Senior Vice President, Account Management

**Status:** Exempt

**Purpose of position:**

Partner with clients and clients' employees to ensure resolution of employee claims. Manage client eligibility data.

**Relationships:**

Clients, Carrier/Vendor Partners, Internal Employees

**Essential Duties and Responsibilities:**

1. Work directly with clients and clients' employees to resolve claims and eligibility issues.
2. Capture claim information in Agency Management System.
3. Manage health plan and ancillary benefit eligibility data for select clients using their technology solution.
4. Follow up with client and share status of claims on a regular basis.
5. Maintain a strong base of carrier/vendor relationships to contact directly with client claim issues.
6. Review pending issues on a regular basis.
7. Track all claim issues on a daily basis.
8. Provide internal team with a monthly report on claims received.
9. Prepare monthly claim reports for assigned clients.

## **Claims Coordinator**

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

- A bachelor's degree from an accredited university and at least four years of progressive experience in field of claims support or a high school diploma or equivalent and at least six years of progressive experience in the claims support industry.
- Experience working in a claims 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 sympathetic to client concerns.
- Expert knowledge of Microsoft Office including Word and Excel.
- Strong organizational skills.
- Ability to multi-task and handle multiple projects with deadlines at the same time.
- Ability to work quickly and accurately.
- Ability to work as a team member, externally and internally.

### **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 regular and reliable attendance.
- Position requires proficiency in English and grammar usage skills.
- Position requires minimal travel (less than 10% of 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.

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**Employee Name**

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**Date**