

Job Description and Responsibilities

Position Title: Operational Account Manager

PRIMARY FUNCTIONS

- Serve as the backend processing team for the department, not customer facing.
- Technical savvy is a must for this position - Excel proficiency required.
- Process the following types of requests but not limited to:
- Processes eligibility files, contribution files, and change files for groups that elect this method of transmission
- Process termination and enrollment requests
- Process requests that are relevant to the renewal process for existing clients, and assist with their annual open enrollment tasks each year
 - Discrimination Testing
 - Plan Document Revisions or Builds
- Oversees all aspects of banking setup and changes loaded in the platform for existing and new client accounts,
 - audit all employer banking set-ups and loads required signatures for check printing
- Research & Projects-research to resolve file exceptions, enrollment errors, system issues, audits and special projects.
- Troubleshoots any system issues with the appropriate platform vendor, and informs all departments accordingly

OTHER RESPONSIBILITIES

- Cultivate and maintain and image of respect with all competitors.
- Maintain and improve professional product knowledge, markets, rules, regulations and other industry issues.
- Recommend possible gains in efficiencies in operations.
- Act with integrity and maintain honest communications with customers and fellow employees

QUALIFICATIONS

- Experience with Excel is required
- Understanding of products in the Flexible Benefits industry to include HAS/FSA/HRA/COBRA a plus.
- Demonstrated advisory skills and ability to deal well with people.
- High level of organizational ability.
- Excellent communication skills
- Friendly, positive and approachable demeanor
- Strong and responsive listening skills
- Ability to adapt within and to varying work environments or client locations
- Ability to adhere to privacy and confidentiality expectations