



JOB DESCRIPTION

Job Title: Paralegal (ERISA)

Status: Non-Exempt

Department: Compliance (AT3000)

Location: Irvine, CA

Reports to: Vice President Compliance, WGAT & PCMI

Approved by: Director, Organizational Development & Effectiveness

JOB DESCRIPTION SUMMARY

This position reports to the Vice President of Compliance and is responsible for drafting, amending, and tracking changes to ERISA and non-ERISA health plan coverage documentation including, but not limited to, summary plan descriptions, summaries of benefits and coverage, amendments, summaries of material modification and ERISA wrap documents.

QUALIFICATIONS

- Bachelor's degree in health care administration, English, or legal studies, or equivalent concentration preferred.
- Active Paralegal Certification required.
- Ten years' experience in the self-insured health benefits industry with prior work history at a third party administrator, sophisticated health insurance brokerage house, or insurer providing Administrative Services Only (ASO) arrangements.
- Ten years' experience drafting, amending, and tracking changes to self-insured health benefit plan documents, summary plan descriptions, and summaries of benefits and coverage.
- Certification as health benefits specialist preferred.
- Detailed understanding of laws governing self-insured health plans including: Affordable Care Act, ERISA, COBRA, HIPAA, and applicable Internal Revenue Code Sections 105 & 125.
- Understanding of cafeteria plans, section 125 flexible spending arrangements, and health savings accounts.
- Experience filing form 5500s preferred.
- Understanding of multiple employer welfare arrangements preferred.
- Expertise with Microsoft Office software programs including Word, Excel, and Outlook.
- Excellent analytical, writing and verbal skills.
- Outstanding organizational skills, customer service, phone and email communication and research abilities.

DUTIES AND RESPONSIBILITIES

Drafting Documents

- Draft customized comprehensive ERISA plan documents, summary plan descriptions, summaries of benefits and coverage, material modifications, and ERISA wrap documents.
- Adhere to document production timelines to ensure efficiency and timely document production
- Develop audit protocol to ensure accuracy of documentation.
- Complete continuing education credits through an approved and accredited institution or vendor to stay up to date on latest documentation technique and best practices to ensure that our organizations are using cutting edge language.

Sales Support & Internal Client Communication

- Work directly with the account management and sales team to manage and facilitate the sales process with clients by describing document production services, turn-around times, and availability of customization.
- Provide technical guidance regarding plan language and training for prospects, clients, brokers, consultants and the internal team as needed. Provide assistance when a client or team member requires assistance understanding the plan language or the underlying legal requirement giving rise to the language.
- Provide annual amendment recommendations based on changes in the laws/regulations or best practice changes in the self-insurance industry.
- Develop and implement interdepartmental guidelines as needed to improve turnaround time of requests for information from key contacts.

Record Keeping

- Maintain client order log including status of open, pending, and completed orders.
- Develop expertise with legal department document retention software in order to maintain compliance with document retention polices.
- Maintain version control of documentation including original, modifications, and amendments.
- Maintain record of plan notices, summaries of material modifications, and client communications.

Other

- Keep abreast of laws and regulations impacting employee benefits, claims procedures, and notice requirements by using our legal database subscriptions to research, analyze and understand changes in the law and/or regulations.
- Utilize all capabilities to satisfy one mission — to enhance the competitiveness and profitability of our members. Do everything possible to help members succeed by being curious and striving to understand what others are trying to achieve, planning and executing work in a helpful and collaborative manner, being willing to adjust efforts to ensure that work and attitude are helpful to others, being self-accountable, creating positive impact, and being diligent in delivering results.
- Maintain an active Paralegal Certification.
- All other duties as assigned.



PHYSICAL DEMANDS/WORK ENVIRONMENT

The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand, walk and sit. The employee is frequently required to use hands to finger, handle, or feel objects, tools, or controls and reach with hands and arms. The noise level in the work environment is usually moderate.

ACKNOWLEDGEMENT

I have read and understand the duties and responsibilities of this position and accept them. The primary function of this position is clear to me and I understand its importance to the overall success of the company. I have read the essential position functions and can perform them:

- With accommodation (include attachment with details)
- Without accommodation

Print Name

Date

Employee Signature