

## Position Description

**Position Title:** Account Representative  
**Department:** Account Management  
**Position Location:** In-office  
**Position Classification:** Hourly, Non-Exempt

**Date:** May 2025  
**Reports to:** Client Services Manager

### JOB SUMMARY

This position acts as a liaison between the plan administrator and MedBen and cultivates and maintains a positive relationship with the client and consultant representative. Account Representatives are responsible for overseeing administration of self-funded benefit plans.

### SPECIFIC DUTIES

- Enrolls new groups and attends employee enrollment meetings
- Initiates the contract renewal process and meets with clients in an effort to maintain current business
- Communicates plan information to appropriate MedBen departments and responds to plan questions from plan administrators, brokers, covered persons, and MedBen employees
- Gather information (e.g., benefits, banking arrangements, and trust arrangements) necessary for the administration of a group's self-funded plan and communicates it internally to appropriate personnel.
- Assists brokers with employee enrollments when required
- Coordinates the administration of the other benefits such as group life insurance, dental, vision and prescription drug plans
- Researches and resolves day-to-day client questions and problems; responds to internal questions and requests for information
- Reviews new and current plans for general compliance and discusses any non-compliant issues with the plan administrators
- Meets with each assigned group in accordance with a previously determined schedule to review reports and discuss any service-related issues
- Ensures all MBA contracts, excess stop loss policies, PPO applications and any other documents are accurate and complete
- Other duties as assigned

### PREFERRED KNOWLEDGE, SKILLS, AND EXPERIENCE

- Minimum 1-2 years or more experience in the insurance industry, preferably in a third-party administrator setting
- Ability to interpret and apply policies, certificates, and plan documents in order to advise plan administrators for effective compliance
- General understanding of ERISA, COBRA, and applicable state laws
- Professional verbal, written, and people skills in order to effectively communicate at the end user's level
- Highly organized with ability to prioritize and meet deadlines and turnaround times
- Proficient hardware and software computer experience, including Microsoft Office, Word, Excel, Outlook, and Teams programs preferred
- Effective time management, analytical and organization skills
- Committed to providing excellent customer service with effective time management, problem-solving, and resolution skills

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## **SCHEDULE AND OTHER REQUIREMENTS**

Account Representatives are paired in order to cover department hours of 8 am – 5 pm Monday – Friday. Periodic overtime may be required.

Due to high volume business need, this department has annual vacation blackout periods the last week of June and December 1 – January 15.

Position requires travel by car, plane, or other transportation to the client's location and may include overnight or extended stays. A valid license to operate a motor vehicle is required.

If you have any questions regarding a specific job position or completing the [MedBen Employment Application](#), please contact MedBen Human Resources Manager Jill Evans at (740) 522-7382 or [medbenhr@medben.com](mailto:medbenhr@medben.com).

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