

Job Title	Lead, Document Processing
FLSA Classification	Non-Exempt
Salary Grade/Level/Family/Range	
Reports to	Manager, Participant Services
Location	Seattle, WA Office
Date	Created August 2023
Prepared by	ADEPT Human Resources

Job Description

Summary/objective

The Document Processing Lead acts as team leader and is responsible for timely and accurate document processing, training, communicating, scheduling, and mentoring. The Document Processing Lead must work with plan participants, employers, local unions, and auditors with the objective of improving relationships and enhancing services to employers and members.

Essential functions

Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

Organization Support

- Completing processing and data entry for enrollment type forms, authorization to transfer benefits, and applications for self-contributions including COBRA and Retiree Health Plans.
- Maintain Office of Support Enforcement and Medicare Part D updates.
- Train, update, and explain policy and document changes for new and existing personnel to achieve depth of knowledge within the Documents team.
- Schedule and provide support monthly closeout.
- Support mailroom operations.
- Analyze and report problem areas making recommendations for improvement.
- Coordinate with other leads or supervisors, when necessary.
- Provide courteous and timely resolutions to customer inquiries both internally and externally.

Lead Responsibilities

- Assign priorities, instruct employees on projects and review assignments.
- Demonstrate leadership skills while directing the flow of departmental duties.
- Ensure that prompt, efficient, and courteous service is being rendered.

Competencies

- Critical thinking and writing skills.
- Well-organized, skilled in time management and ability to prioritize tasks.

- Excellent communication and interpersonal skills.
- Attention to detail and problem-solving ability.

Supervisory responsibilities

- Lead department employees.

Required education and experience

- High School graduate and/or GED equivalent.
- 5 years of experience, enrollment processing, and maintaining participants demographics for benefit eligibility.
- Working knowledge of Microsoft Office Suite (Word, Excel, Outlook).
- Communicate effectively, both verbally and in writing.
- Proven ability to maintain a realistic balance among multiple priorities.

Preferred education and experience

- College degree from accredited, four-year program.
- Working knowledge of unions, Taft-Hartley, or collective bargaining.
- Prior experience supervising employees.
- Accounting experience.
- Ability to exercise good judgment in a variety of situations.
- Administrative and organizational skills.
- Strong documentation skills.

Work environment

The physical location will be an onsite standard office setting at the Northwest Trusts office as determined by the employer. The work duties and environment described above are considered professional and appropriate business casual attire is required.

Position Type and Expected Hours of Work

Full-time. Minimum of 37.5 hours onsite of work per week, typically Monday through Friday. Core hours are 9:00 am to 3:00 pm. to interact with all departments within the organization in person, onsite. Additional offsite hours may be required to complete all aspects of the position.

Physical demands

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 may be made to enable individuals with disabilities to perform the essential functions.

- Prolonged periods sitting at desk and working on a computer.
- Must be able to occasionally lift 30 pounds at a time.
- Must be able to interact and communicate effectively with employees, management, vendors and customers/clients.

- Must be able to use office equipment including telephones, computers, fax and copier machines.
- Requests for reasonable accommodations are considered, as required by law.
- Regular and reliable attendance, and ability to work flexible days and hours.

Other Requirements

Becoming and maintaining membership in good standing with OPEIU local 8 within 31 days from date of hire is required.

Travel Required

Business travel may be assigned 10% or less per year.

Other duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

Signatures

This job description has been approved by:

Manager _____ Date _____

HR _____ Date _____

Employee signature below indicates the employee's understanding of the requirements, essential functions, and duties of the position.

Employee _____ Date _____