Retirement System Benefits Specialist

CLASS TITLE	CLASS CODE	SALARY GROUP	SALARY RANGE
RETIREMENT SYSTEM BENEFITS SPECIALIST I	2914	B18	$45,521 - $71,055
RETIREMENT SYSTEM BENEFITS SPECIALIST II	2915	B20	$51,158 - $81,351
RETIREMENT SYSTEM BENEFITS SPECIALIST III	2916	B22	$57,614 - $93,138
RETIREMENT SYSTEM BENEFITS SPECIALIST IV	2917	B24	$65,104 - $106,634
RETIREMENT SYSTEM BENEFITS SPECIALIST V	2918	B26	$76,530 - $129,430

GENERAL DESCRIPTION

Performs retirement or benefits program administration and assistance work involving maintaining and updating member benefit records, monitoring and/or determining benefits eligibility and processing applications for benefits, assisting clients with retirement or benefits program inquiries, and conducting retirement or benefits seminars.

DISTINGUISHING CHARACTERISTICS

The Retirement System Benefits Specialist job classification series is intended for employees who provide counseling and guidance to members in understanding and selecting benefits and review eligibility and compliance with laws and regulations. In contrast, the Retirement System Operational Specialist job classification series is intended for employees who are primarily responsible for processing transactions and maintaining records related to retirement system operations.

EXAMPLES OF WORK PERFORMED

Calculates costs of securing retirement credit for military, withdrawn, delinquent, or other types of special services.

Counsels members on benefit options and procedures consistent with applicable rules and laws.

Provides information on and interprets laws, rules, and procedures governing employee retirement and benefits programs.

Reviews applications for benefits and related legal documents for compliance, accuracy, and completeness.

Processes service or disability retirement applications and death claims for beneficiaries.

Reconciles member benefits accounts and resolves discrepancies.

Researches and verifies records to determine eligibility for benefits, calculates benefits purchasing costs, and audits forms and reports.

Updates files and researches and verifies records to determine coverage and eligibility of clients.

Performs related work as assigned.

DESCRIPTION OF LEVELS

Examples of work and descriptions are meant to progress through the levels. For example, an employee at level V may also perform work listed within the previous levels.

***Note**: Factors that may distinguish between levels include the degree of independence in performing the work, the complexity of the work, the scope of responsibility, and the employee's related work experience, education, and certifications.*

A senior-level employee (level III-V) may serve in a lead or supervisor role; however, lead or supervisory responsibilities within this job classification series will typically be found at levels IV or V within large, complex retirement systems. Senior-level employees may perform the full range of work identified within every level in the levels preceding their own, and/or may coordinate or oversee or coordinate that work for others. Factors that may distinguish between senior levels include the scope of responsibility and oversight, the complexity of retirement or benefits administration duties, and the employee's related work experience, education, and certifications.

RETIREMENT SYSTEM BENEFITS SPECIALIST I: Performs moderately complex (journey-level) retirement or benefits program administration and assistance work. Works under moderate supervision, with limited latitude for the use of initiative and independent judgment. Employees at this level may have limited experience or no experience and spend the majority of their time performing simple to routine work following standard procedures.

RETIREMENT SYSTEM BENEFITS SPECIALIST II: Performs complex to highly complex retirement or benefits program administration and assistance work. Works under general to limited supervision, with moderate latitude for the use of initiative and independent judgment. Employees at this level perform primarily journey-level work and are expected to take on an expanding range of senior-level responsibilities in a developmental capacity, with increasing independence and discretion. Employees may:

- Conduct individual or group retirement or benefits seminars.
- Evaluate the authenticity of records and certifications
- Research and analyze records to determine creditable service and verify salaries, performing complex manual calculations as needed.

RETIREMENT SYSTEM BENEFITS SPECIALIST III: Performs highly complex (senior-level) retirement or benefits program administration and assistance work. Works under limited supervision, with considerable latitude for the use of initiative and independent judgment. Employees may:

- Evaluate processes for compliance with procedures, policy, and statutes.
- Conduct audits of benefit eligibility and payments to ensure compliance with applicable laws, rules, and regulations.
- Recommend and participate in the development or revisions of policies and procedures.
- Represent the department as a subject matter expert on agency projects and implementations.
- Conduct training on the administration of retirement and benefits programs and plans.

RETIREMENT SYSTEM BENEFITS SPECIALIST IV: Performs advanced (senior-level) retirement or benefits program administration and assistance work. Works under minimal supervision, with considerable latitude for the use of initiative and independent judgment. Employees at this level may fully perform highly complex retirement or benefits program administration and assistance work and may:

- Analyze trends and identify operational inefficiencies, leveraging statistical analysis to drive improvements.
- Analyze information from reports and outside sources to monitor benefits eligibility.
- Handle escalated matters related to complex issues and respond to retirement plan members.
- Reconcile benefit discrepancies, financial data, and bank statements or reports of financial data.

RETIREMENT SYSTEM BENEFITS SPECIALIST V: Performs highly advanced (senior-level) retirement or benefits program administration and assistance work. Works under minimal supervision, with extensive latitude for the use of initiative and independent judgment. Employees at this level may be considered technical experts in the field and may:

- Provide guidance to staff with application of laws, rules, policies, and procedures relating to benefits.
- Research and prepare responses regarding resolution of complex benefits and other related issues for agency staff, retirement plan members, state officials, and related organizations.
- Research appeals of benefit decisions and prepare recommendations and responses for management review.
- Research, analyze, and evaluate current benefits program plans, policies, procedures, guidelines, processes, and systems; and assist management in the strategic planning, development, and implementation of improvements and enhancements.
- Review benefits documentation to ensure compliance with agency and legal requirements.

GENERAL QUALIFICATION GUIDELINES

EXPERIENCE AND EDUCATION

Agencies have the discretion to identify the general or specialized experience, education, or certifications required for positions and may tailor qualification requirements to specifically meet the agency's business needs. Agencies may substitute experience, education, military service, apprenticeships, and relevant credentials for one another, if appropriate and allowed by statute.

KNOWLEDGE, SKILLS, AND ABILITIES

For all levels

- Knowledge of mathematics and of retirement or benefits laws, policies, rules, and procedures.
- Skill in the use of a computer and applicable software.
- Ability to interpret employee benefits and retirement program rules, to maintain accurate records, to recognize and solve problems, to perform mathematical calculations, to reconcile financial data, and to communicate effectively.

Additional for Retirement System Benefits Specialist V

- Knowledge of advanced principles and practices of retirement or benefits program administration, and of auditing principles related to benefit eligibility and payments.
- Skill in analyzing and interpreting complex data related to a retirement or benefits program.
- Ability to identify systemic issues and recommend improvements to a retirement or benefit program, to provide expert consultation to internal staff or agency leadership on complex benefit matters, and to oversee and/or supervise the work of others.