



# Retirement System Benefits Specialist

CLASS TITLE	CLASS CODE	SALARY GROUP	SALARY RANGE
RETIREMENT SYSTEM BENEFITS SPECIALIST I	2912	B14	\$37,144 - \$55,134
RETIREMENT SYSTEM BENEFITS SPECIALIST II	2913	B16	\$40,918 - \$61,130
RETIREMENT SYSTEM BENEFITS SPECIALIST III	2914	B18	\$45,521 - \$71,055
RETIREMENT SYSTEM BENEFITS SPECIALIST IV	2915	B20	\$51,158 - \$81,351
RETIREMENT SYSTEM BENEFITS SPECIALIST V	2916	B22	\$57,614 - \$93,138

## 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.

## EXAMPLES OF WORK PERFORMED

Audits records to determine creditable service and verify salaries.

Calculates costs of securing retirement credit for military, withdrawn, delinquent, or other types of special services.

Counsels members on retirement options and procedures.

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.

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 entry and journey levels include the level of independence in performing the work and the complexity of the work and may include the years*

*of related experience, education, and certifications. Employees at the journey or senior levels may independently perform the full range of work listed in the examples or may assist others in that work.*

**RETIREMENT SYSTEM BENEFITS SPECIALIST I:** Performs entry-level to routine (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 (journey-level) retirement or benefits program administration and assistance work. Works under general supervision, with moderate latitude for the use of initiative and independent judgment. Employees at this level may work more independently than those at the previous level and may routinely assist other staff in performing work of greater complexity. Employees may:

- Process service or disability retirement applications and death claims for beneficiaries.
- Reconcile member benefits accounts and resolve discrepancies.
- Research and verify records to determine eligibility for benefits, calculate benefits purchasing costs, and audit forms and reports.

**Note:** *A senior-level employee (level III-V) may serve in a lead or supervisor role. Senior-level employees may perform the full range of work identified within every level and/or may 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 experience, education, and certifications.*

**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:

- Conduct individual or group retirement or benefits seminars.
- Evaluate the authenticity of records and certifications.
- Evaluate processes for compliance with procedures, policy, and statutes.

**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:

- Participate in program planning, development of procedures, and policy changes.
- Reconcile benefits discrepancies, financial data, and bank statements or reports of financial data.
- Determine trends and resolve operational inefficiencies.

**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:

- 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**

Experience in retirement or benefits program work. Graduation from an accredited four-year college or university with major coursework in business administration, insurance, or a related field is generally preferred. Experience and education may be substituted for one another.

### **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 Benefits Specialist V**

- Ability to oversee and/or supervise the work of others.