

ASSOCIATE RETIREMENT BENEFITS EXAMINER

Duties and Responsibilities

This class of positions encompasses technical work, supervisory work and counseling work of varying degrees of difficulty and responsibility, in the field of retirement benefits examining. There are three Assignment Levels within this class of positions. All personnel perform related work.

Assignment Level I

Under general supervision, performs work such as the following:

Examples of Typical Tasks

Evaluates complex service and salary data; makes complex computations regarding service, salary, annuity accounts, Increased Take Home Pay data, and various benefits accruing to prospective and actual retirees and their beneficiaries.

May supervise a small group or unit performing retirement benefits work. Trains subordinates, assigns, reviews and evaluates their work and maintains production records.

Keeps records, searches and updates files and retrieves information using computers and paper records.

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RETIREMENT BENEFITS EXAMINING
OCCUPATIONAL GROUP [243]

CODE NO. 40493

ASSOCIATE RETIREMENT BENEFITS EXAMINER (continued)

Assignment Level I (continued)

Examples of Typical Tasks (continued)

Corresponds with pensioners, agencies, attorneys, and Worker's Compensation Board, etc.

Counsels retirement system members and/or potential members.

Incidentally performs the duties of an Assistant Retirement Benefits Examiner.

In the temporary absence of the supervisor, may perform the duties of that position.

Assignment Level II

Under general supervision, performs supervisory and very difficult and complex retirement benefits work or counseling work such as the following:

Examples of Typical Tasks

Supervises and coordinates one or more units engaged in retirement benefits examining.

Assists in the supervision of day-to-day operations in a division, and participates in recommending changes in practices and procedures.

Participates in the analysis and evaluation of production records and trends.

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ASSOCIATE RETIREMENT BENEFITS EXAMINER (continued)

Assignment Level II (continued)

Examples of Typical Tasks (continued)

Develops and implements employee training, appraisal and evaluation programs.

Checks and reviews complex computations, such as those involving deficits, purchase of prior time, entry and re-entry into system, and death benefits, including presumed retirement death benefits.

Schedules and monitors the work of subordinates; verifies validity of applications and documents accepted by subordinates.

Writes reports and prepares calendars of Board actions.

Counsels new employees, retirement system members, prospective retirees, and other interested parties on the benefits of membership and/or operations of the retirement system.

Processes members for scheduling to appear before the Medical Board.

Computes retirement benefits.

Assists members in planning, choosing of options, selection of alternate forms of beneficiary protection, etc.

Gives informational and training talks regarding retirement benefits to groups, such as operating agency personnel officers and employee organizations.

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ASSOCIATE RETIREMENT BENEFITS EXAMINER (continued)

Assignment Level II (continued)

Examples of Typical Tasks (continued)

Develops explanatory material for dissemination to employees, personnel officers and other interested parties.

May serve as principal assistant to an Associate Retirement Benefits Examiner - Assignment Level III.

Incidentally performs the duties of Assignment Level I.

In the temporary absence of the supervisor, may perform the duties of that position.

Assignment Level III

Under administrative supervision, exercises administrative and/or technical supervision in retirement benefits examining.

Examples of Typical Tasks

Supervises and coordinates the work of a division engaged in retirement benefits examining. May recommend changes in policies and procedures of the retirement system.

Analyzes and evaluates production records and trends.

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Assignment Level III (continued)

Examples of Typical Tasks (continued)

Reviews employee training, appraisal and evaluation programs to assure satisfactory progress in staff development.

Serves as technical consultant on complex retirement benefits questions.

Plans and conducts programs and approves and disseminates materials designed to provide information about the retirement system to members and other interested parties. Gives speeches; oversees preparation of informational manuals, bulletins, brochures, etc.; insures timely and effective responses to inquiries; and resolves complaints about information and counseling programs.

Incidentally performs the duties of Assignment Levels I and II.

In the temporary absence of the supervisor, may perform the duties of that position.

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ASSOCIATE RETIREMENT BENEFITS EXAMINER (continued)

Qualification Requirements

1. An associate degree or completion of 60 semester credits from an accredited college, including or supplemented by 9 semester credits in mathematics, statistics, accounting and/or actuarial science and two years of satisfactory full-time experience performing mathematical, statistical, actuarial or accounting computations in one or more of the following: **a)** a retirement or employee benefits plan; **b)** for customer service in a financial institution; and/or **c)** in a position requiring the application of law, rules and regulations and the use of statistical, actuarial or similar tables; or
2. A four-year high school diploma or its educational equivalent and four years of the experience described in "1" above. Each 15 semester credits from an accredited college including at least 3 credits in the areas described in "1" above may be substituted for each 6 months of experience to a maximum of 2 years experience. All candidates must have a four-year high school diploma or its educational equivalent and at least 2 years of experience as described in "1" above.

Direct Lines of Promotion

From: Assistant Retirement Benefits
Examiner (40491)

To: Administrative Retirement
Benefits Specialist
(M 82986)