

**Trust Funds Specialist-Advanced
Benefit Services Bureau Trainer
Position #317638**

POSITION SUMMARY:

Under general supervision of the Benefit Services Bureau Deputy Director, this position functions as a trainer and resource for Benefit Initiation Sections. This position partners with the section leads, supervisors, and trainers to develop, coordinate, and deliver staff training to new and existing staff, using adult education techniques and methodologies. This includes coordinating the delivery of program/policy training with the Division's policy advisors; leading efforts to translate knowledge into clear, concise formats that are accessible, usable, appropriate, and tailored to the varying needs of staff; assessing training programs and expected results; and reporting findings along with recommended improvements or enhancements to the supervisor and lead worker.

In addition, this position completes research and analysis to determine resolution of complex questions and issues raised by Trust Fund Specialists, supervisors, managers, employers, participants and other parties; assists in implementation of new legislation or policies, including development of effective operational training plans; provides operational support for the supervisors, lead workers, and staff; and assists in processing tasks in work basket queues and responding to member, health plans and employer inquiries.

ETF is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs to over 630,000 members receiving \$5.6 billion in retirement benefits and \$1.6 billion in health benefits annually. This position directly supports achieving the department's mission to develop and deliver quality benefits and services to our members while safeguarding the integrity of the Trust. As an employee of ETF, the incumbent will support and create a diverse and inclusive work force.

GOALS & WORKER ACTIVITIES:

30% GOAL A: Development, Delivery, Coordination and Monitoring of Staff Training

- A1. Discuss and establish training objectives with supervisors and prepare training plan for new staff.
- A2. Identify the learning needs of new and existing staff in consultation with Bureau leadership, the Division Trainer, and other appropriate parties based on work planning priorities, strategic initiatives, and emerging issues. Design training curriculum based on recommendations to address current and emerging needs.
- A3. Participate in learning needs assessment efforts to better prepare staff for the short- and long-term operational goals of the Division. Ensure learning resources and programs are in place to meet these goals, specifically including materials to help staff achieve success in using new technology implemented as part of modernization.
- A4. Develop training plans and written objectives. Select methodologies and format, and identify appropriate tools (e.g., instructions, outlines, form samples, work examples, technology, and media)
- A5. Partner with lead worker to create and maintain training manuals with accurate and current form samples, work examples, sample letters, worker instructions, etc., to be used by new staff and as a reference tool for existing staff.
- A6. Develop and maintain extensive working knowledge of laws, rules, contract provisions, policies, etc. that relate to ETF insurance programs (health, life, ICI, sick leave benefits, pharmacy benefits, Medicare, benefit providers full file compare, etc.). Impart such knowledge to staff members through training materials and consultation.

- A7. Write, revise, and disseminate to staff explanations of complex and technical programs, statutes, policies, and initiatives.
- A8. Train and audit new staff on Section operations, workflow, procedures, most frequently used computer systems, and how Bureau functions and processes relate to other units within the Department.
- A9. Train and audit current staff as necessary to ensure consistent processing and performance of duties, and to ensure Section staff are up-to-date with new issues, new applications, and changes in benefit program law or policy.
- A10. Make recommendations to supervisors on process or procedural changes to comply with pending or enacted legislation, or simply to make a current process more accurate and/or efficient.
- A11. In conjunction with Department policy staff, train new staff on departmental policy, the substance of benefit programs administered by the Department, and the applicability of Wisconsin Statutes, Administrative Code, and other pertinent laws and regulations.
- A12. Monitor training progress of individual staff, adjust training plans as needed, and report progress to supervisors.
- A13. Evaluate effectiveness of training programs by assessing application of learning to job performance and make training program adjustments as appropriate.
- A14. Draft new procedures for undocumented or new work processes as necessary to implement laws, administrative rules, department policies, etc., seeking input from staff, policy advisors, supervisors, managers, administrators, and outside parties as appropriate.
- A15. Develop a shared platform for storing and accessing section procedures and policies that includes history of member case issues and resolutions.

30% GOAL B: Performance of Insurance Liaison Functions

- B1. Provide input, suggestions, and feedback to other areas of the Department on insurance related needs and problematic trends identified through member, employer, and retiree contacts.
- B2. Evaluate the volume and nature of retiree insurance contacts that are referred to Benefit Services by the Call Center for additional information or specialized service. Develop training and/or communication pieces for the Call Center to resolve retiree insurance inquiries.
- B3. Based on volume and nature of insurance contacts, develop training and/or communication pieces for section staff to improve the efficiency and effectiveness of insurance processing activities.
- B4. Develop and provide training information to other areas of the Bureau, Division, and Department on insurance services issues in conjunction with section leads, supervisors, and other trainers.
- B5. Serve as a contact point for other areas of the Bureau, Division, and Department for the exchange of information and initiating discussion and issue resolution regarding member, retiree, and employer service and operations.
- B6. Work in conjunction with policy analysts to research statutes, rules, policies, and participant records for use in responding to employer and member questions.

- B7. Work with departmental staff to resolve complex issues related to retiree payments, retiree health insurance, and sick leave certification as well as active member eligibility.
- B8. Serves as a resource for other departmental staff (such as a legal staff) for complex benefit determinations.

20% GOAL C: Management of Insurance Data and Information

- C1. Identify, research, and resolve discrepancies between Department data/information and carrier information as well as relational errors in Medicare coverage.
- C2. Communicate and coordinate with insurance carriers, the Pharmacy Benefit Manager, employers, IT staff, and other areas of the Department, etc., to update and maintain the accuracy of system data.
- C3. Evaluate practices and procedures to ensure timely and accurate retiree health insurance information in the Benefit Payment System (BPS), Accumulate Sick Leave (AcSL) and myETF Benefits. Identify data discrepancies or problems with the flow of information between the systems. Provide input and recommendations for possible solutions and process improvements.
- C4. Research and resolve noncompliance issues related to Medicare enrollment, residency requirements for some plans, accuracy of Social Security numbers/member ID numbers, and other critical data, etc.
- C5. Establish a process to identify potential health insurance invoice discrepancies due to continued updates to employee health contracts. Develop procedures to track and timely resolve employer reconciliation issues to ensure accurate invoicing is occurring between employers, employees and health providers.
- C6. Establish an internal quality control program by auditing the section's customer service responses (phone calls, e-mail responses, workflow jobs, etc.). Provide appropriate staff training as determined through audit results.
- C7. Create reports and other documents from system queries to respond to requests from other sections, employers, and TPA's for insurance data.

15% GOAL D: Assurance of Timely and Accurate Administration of Sick Leave Credit Programs

- D1. Identify, research, and resolve discrepancies between Department data/information and employer reported information.
- D2. Evaluate practices and procedures to ensure timely and accurate sick leave credit information in the Accumulated Sick Leave (AcSL) System. Identify data discrepancies or problems. Provide input and recommendations for possible solutions and process improvements.
- D3. Use system queries to produce annual sick leave statements and generate other documents and reports.
- D4. Develop and provide training information for BIS unit 3 and other areas of the Department on sick leave credit programs.
- D5. Evaluate the volume and nature of inquiries regarding sick leave issues. Develop additional training and/or communication pieces to resolve inquiries.

- D6. Assist the Legislative Audit Bureau (LAB) with annual review of the AcSL, BPS, MEBS, and myETF Benefits Systems.
- D7. Assist with the maintenance of AcSL generated letters/mailers and daily review of AcSL System assurance reports

5% GOAL E: Other Duties As Assigned

- E1. Assist and support other areas of the Benefit Services Bureau as directed by Deputy Director.
- E2. Participate in staff meetings and training programs.
- E3. Advise Supervisor of problems or unusual situations encountered when completing job duties; provide input on possible solutions or corrective actions needed.
- E4. Recommend, review and provide input on the creation and improvement of forms (electronic or otherwise) used by the section.
- E5. Represent the Department on various requirements gathering meetings to aide in the development and implementation of strategic projects and initiatives.

KNOWLEDGE, SKILLS, AND ABILITIES

1. Knowledge of training needs assessment methods and techniques.
2. Knowledge of training or instructional strategies and methodologies.
3. Knowledge of methods and techniques for evaluating results of staff training.
4. Knowledge of benefit programs administered by the Department.
5. Ability to interpret and apply Wisconsin statutes, Administrative Code and other technical resources related to annuity payments, health insurance and sick leave.
6. Ability to research, analyze and determine appropriate responses to complex questions.
7. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
8. Ability to perform complex mathematical calculations.
9. Knowledge of procedure writing methods and techniques.
10. Ability to effectively and professionally communicate technical and complex information to a lay audience.
11. Strong communication and interpersonal skills, including documentation and presentation skills.
12. Ability to interact positively with a variety of persons at different levels within and outside the organization.
13. Ability to lead staff, provide constructive feedback, and work effectively in a team environment.
14. Excellent customer service skills.
15. Ability to audit work of other staff.
16. Conflict management skills, including skill in facilitating difficult and sensitive employee and customer interactions.
17. Skills in the use of Microsoft Office Suite, including Word, Excel, and Outlook.
18. Knowledge of the uses and applications of web-based computer programs.
19. Knowledge of strategic planning and goal setting techniques.
20. Ability to manage change and work in a rapidly changing environment.
21. Knowledge of effective time management, organizational and priority setting techniques, including the ability to prioritize for effective workload management and handle multiple priorities simultaneously.
22. Ability to independently make sound judgments and decisions.
23. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.
24. Commitment to creating a diverse and inclusive work force.