

POSITION #337349

Trust Funds Supervisor – Benefit Initiation Section

POSITION SUMMARY

Under the general supervision of the Benefit Services Bureau Deputy Director, this position directs the staff of a unit of the Benefit Initiation Section in the timely and accurate review, processing, calculation, and adjustments for Wisconsin Retirement System (WRS) retirement, disability, and death benefit applications. Responsibilities include managing all benefit application review, processing, and calculation functions, such as: certifying retiree life insurance coverage; initial adjudication of life insurance and living benefit claims; establishing estimated retirement annuity benefits on the monthly payroll; determining IRS minimum distribution requirements and processing forced distributions; and accurate computation, adjustments, finalized calculations, and taxability determinations for monthly and lump sum separation, death and retirement benefits, including rollovers.

This position participates in planning and implementing new programs, laws, and rules that affect Section, Bureau and Division operation; develops, oversees, and monitors the integrity of benefit review, processing, and calculation systems in accordance with Department internal control standards; and collaborates with the other Benefit Initiation Supervisor to ensure consistent training, production, priority, and other standards between the units.

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: Management of Workload and Workflow

- A.1 Manage Section workload and workflow to enhance and maintain quality and timeliness of customer services provided.
- A.2 Create, staff, and maintain a productive work unit to serve WRS members timely, accurately, and courteously.
- A.3 Evaluate Department's customer service needs and assist Bureau Director in developing short-range and long-range service goals and objectives for Bureau. Implement and monitor quality improvement strategies, initiatives, and projects.
- A.4 Develop and implement work plans and maintain staff schedules that ensure workload is handled effectively and efficiently, and that adequate customer service is provided.
- A.5 Develop Section statistic reports for trend analysis and staff planning. Analyze Section and individual staff statistical reports and identify service problem areas. Recommend and implement short- and long-term corrective measures.
- A.6 Develop and implement plans for Section organization, staffing allocation, temporary staffing, workload shifting, automation, and cross-training to meet current and future workload changes.
- A.7 Effectively manage funds allocated for overtime and extra hours to ensure maximum benefit and productivity.

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- A.8 Identify training and education needs of new and existing staff. Direct development and implementation of employee training/education programs and monitor results.
- A.9 Identify and recommend modifications and/or enhancements to automated systems to improve operational efficiency and effectiveness.
- A.10 Assess Section needs for staffing and other resources. Develop budget proposals with appropriate justification for Bureau Director to secure required resources.

25% GOAL B: Supervision of Section staff.

- B.1 Develop and update employee position descriptions. Evaluate and prepare written justification for reclassifications or reallocations as appropriate.
- B.2 Establish employee performance standards; monitor on-going compliance and conduct annual evaluations. Recommend and institute performance improvement initiatives and corrective actions.
- B.3 Manage and maintain leave accounting reporting and vacation schedules.
- B.4 Enforce agency work rules. Recommend and carry-out disciplinary actions up to and including discharge. Investigate and attempt to resolve work-related complaints and grievances.
- B.5 Develop recruitment plans, interview candidates and make recommendation on hiring of permanent, project, limited term (LTE) and contract employees to the Bureau Director.
- B.6 Create and maintain a positive work environment that promotes teamwork, enhances employee morale and ensures cooperative and effective working relationships with other ETF employees.
- B.7 Support and promote departmental policies and programs including Equity & Inclusion, Health and Safety, Employee Assistance, Family/Medical Leave, etc.

25% GOAL C: Direction of services administered by the Benefit Initiation Section.

- C.1 Direct staff in providing complete, accurate and timely benefit application review, processing, and calculation services to members and their beneficiaries, personal representatives, and other inquiring parties and in completing any required reporting to state agencies and the Department's actuary.
- C.2 Direct staff in effectively responding to member inquiries.
- C.3 Direct staff in the accurate interpretation and application of laws, rules and policies governing WRS benefit application eligibility, processing, calculations, and adjustments.
- C.4 Evaluate the quality of service delivery and the Department's customer service needs, and develop short and long-range service goals and objectives. Implement and monitor quality improvement strategies, initiatives, and projects.

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- C.5 Develop, review, and recommend revisions to benefit application and calculation information in Department publications.
- C.6 Use and integrate Department communication technologies including email, voice mail, video conferencing, internet, intranet, and document imaging for effective Section operations.
- C.7 Continuously assess the quality of service delivery to WRS participants and business partners and develop and implement quality improvement measures strategies.
- C.8 Direct the work of staff involved in the timely and accurate review, processing, calculation, and adjustments of monthly and lump sum WRS benefits, including establishing estimated retirement payments on the monthly payroll and completing finalized annuity calculations.
- C.9 Direct the work of staff in assuring that eligibility for benefits, the taxability of benefit payments, and mandatory deductions such as child support, are accurately and appropriately determined.
- C.10 Direct staff in certifying retiree life insurance coverage and completing the initial adjudication of life insurance and living benefit claims.
- C.11 Direct staff in reviewing, determining, and generating minimum distribution payments in accordance with IRS rules.

10% GOAL D: Implementation of new laws, rules, regulations, policies and/or program changes impacting WRS benefits.

- D.1 Research, analyze, and interpret new or changing laws, rules, regulations or policies governing WRS benefit programs and determine impact on Section operations and functions.
- D.2 Identify and advocate for policy changes to enhance customer service and simplify administration.
- D.3 Identify issues, problems, inconsistencies or contradictions that require clarification and resolution. Communicate to Bureau Deputy Director with assessment and recommendations.
- D.4 In coordination with other departmental sections, bureaus and divisions, assist Deputy Bureau Director in developing implementation plan and timetable. Identify Section's role in implementation including critical tasks and assignments.
- D.5 Assess Section needs for staffing and other resources to efficiently and effectively implement changes. Communicate to Bureau Director with appropriate justification.
- D.6 Develop new and/or revise existing work instructions and procedures needed to implement changes. Identify, plan and direct necessary training of staff.
- D.7 Determine required data processing program modifications. Direct preparation of applicable project requests and serve as user project manager for program testing and validation.
- D.8 Review and recommend revisions to benefit information publications (e.g. forms and brochures) and other communication media (e.g. WRS News and ETF Community articles).

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5% GOAL E: Technology Management

- E.1 Manage all Section technologies to maintain and enhance services.
- E.2 Participate in the design, testing and implementation of system projects and enhancements. This includes working with vendors, business partners, and internal information technology staff to ensure timely problem resolution and workable upgrades.
- E.3 Evaluate base infrastructure technologies and use them to their fullest functional capacities.
- E.4 Investigate, evaluate and recommend hardware and software technology changes to improve staff efficiency and effectiveness. Prepare cost/benefit analysis as required.
- E.5 Direct all technology planning, testing and implementation as it affects the Section.

5% GOAL F: Provision of program and policy support to Bureau Director and Division Administrator.

- F.1 Provide accurate and detailed information to legislators, attorneys, auditors, third-party contractors, and employers within confidentiality guidelines.
- F.2 Investigate and provide oral/written responses to more complicated requests and inquiries. Research and draft departmental determination letters for Bureau Director's signature.
- F.3 Evaluate, recommend, and implement new technologies to improve the efficiency and effectiveness of operations, and to better serve the needs and demands of customers.
- F.4 Direct and/or serve on work groups, project teams, and committees.
- F.5 Perform other special assignments as directed by Deputy Bureau Director.

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KNOWLEDGE, SKILLS, AND ABILITIES:

1. Knowledge of the principles and practices of employee benefit plan administration and operations.
2. Knowledge of and ability to interpret and apply State and federal laws, administrative code, rules and regulations governing the WRS and other ETF administered benefit plans, specifically those related to retirement, disability, and death benefit eligibility, processing, calculations, and adjustments.
3. Highly developed written and oral communication skills and techniques including both technical and business communications.
4. Ability to establish productive and efficient working relationships with others internal and external to the organization.
5. Ability to work effectively with others who may have different perspectives, backgrounds, and/or styles.
6. Knowledge of supervisory principles and procedures.
7. Ability to coordinate the workflow among subordinate staff to maintain appropriate levels of productivity.
8. Knowledge of personnel management principles, techniques, and procedures, including methods to assess staff capabilities.
9. Knowledge of staff development and adult training methodologies and techniques.
10. Experience applying conflict resolution methods and techniques.
11. Knowledge of motivational techniques.
12. Ability to set short- and long-term goals.
13. Knowledge of data gathering and statistical analysis techniques.
14. Analytical and problem solving skills.
15. Knowledge of policy analysis and development methods and techniques.
16. Knowledge of strategic planning techniques.
17. Knowledge of quality improvement philosophy methods and techniques.
18. Organizational skills.
19. Ability to handle multiple priorities simultaneously.
20. Effective public relations and customer service skills and techniques.
21. Knowledge of principles of information system technology.
22. Ability to work in a rapidly changing and fast paced work environment.
23. Knowledge of equity & inclusion, employee health and safety, employee assistance, and FMLA policies and procedures.
24. Ability to understand and comply with all ETF and enterprise security standards, policies, and processes.