

**Trust Funds Specialist  
Employer & Contact Services Bureau  
Position #**

**POSITION SUMMARY**

Under close to limited supervision of the Contact Management Section Chief, this position is responsible for providing detailed benefit and Wisconsin Retirement System (WRS) information necessary for members to make informed life-path decisions regarding all benefit and retirement options available during and after their public service career. This position researches and analyzes member records and ETF administered program information to determine eligibility under statutory provisions and Department policies. Specialists effectively communicate benefits, available options, and applicable deadlines during telephone conversations and in writing. In addition to members, specialists may also provide information to their representatives, survivors, beneficiaries, and other interested third parties. This position requires most of the workday be spent on the phone responding to benefit inquiries. Exceptional customer service skills are essential to this position. As an employee of ETF, the incumbent will support and create a diverse and inclusive work force.

**GOALS AND WORKER ACTIVITIES**

45% GOAL A: Provision of WRS program information  
Worker

- Activity:
- A.1 Research, analyze and respond to phone and written inquiries from members, beneficiaries, or their representatives regarding detailed WRS program information and effectively explain available options, eligibility requirements, and when to apply for benefits.
  - A.2 Verify and update member account information during each interaction ensuring improved integrity of data.
  - A.3 Inform participants about applicable requirements and procedures to purchase other governmental service or forfeited Wisconsin public service credit. Instruct members about the affects purchased service may have to their account.
  - A.4 Research members records and provide detailed account information, including payment status and taxability of benefits.
  - A.5 Research member records and collect pertinent information to ensure accurate processing of requests such as beneficiary designations, estimates, tax withholding, direct deposit, etc.
  - A.6 Maintain confidential information as required by law and rule and inform members and interested 3<sup>rd</sup> parties of the requirement and means to authorize release of information.
  - A.7 Fulfill member requests by mail for benefit information, including estimates, applications, forms and brochures.

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- A.8 Obtain needed information from persons reporting deaths without disclosing confidential information.
- A.9 Provide general WRS program information by phone and email to interested parties such as employers, attorneys, legislators, other state agencies, retirement systems from other states, etc.
- A.10 Promote benefit awareness by identifying and offering additional resources and self-service options.
- A.11 Provide assistance in scheduling face-to-face and virtual appointments with Member Services Representatives to discuss benefits and services.
- A.12 Refer complicated or technical member issues to appropriate Employer Services team.

25% GOAL B: Provision of insurance programs information

Worker

- Activity:
- B.1 Research and respond to telephone and written inquiries from members, their representatives, survivors, etc. regarding detailed insurance program information and effectively explain their available options, alternatives, and applicable deadlines for application.
  - B.2 Maintain confidential information as required by law and rule and inform members and interested 3<sup>rd</sup> parties of the requirement and means to authorize release of information.
  - B.3 Fulfill member requests by mail for insurance information, including applications, forms and brochures.
  - B.4 Promote insurance programs awareness by identifying and offering additional resources and self-service options.

20% GOAL C: Provision of administrative support to the Contact Management Section.

Worker

- Activity:
- C.1 Assist with training new and existing specialists.
  - C.2 Participate in workgroups pertaining to system changes and departmental projects as assigned by supervisor.
  - C.3 Recommend changes to supervisor on programs, processes or software that will improve modernization and customer service for the agency.
  - C.4 Review forms and printed benefit information for accuracy and completeness. Recommend revisions to supervisor.
  - C.5 Perform other duties as assigned.

10% GOAL D: Performance and participation in employee development activities

Worker

Activity: D.1 Maintain job knowledge by staying current on internal communications about changes in process, benefits, procedures, laws, rules, administrative codes.

D.2 Stay current on internal communications about changes that affect this position such as changes to benefit rights, policy, law, rule, process and procedure.

D.3 Participate in staff meetings and training programs.

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**KNOWLEDGE, SKILLS, AND ABILITIES:**

1. Ability to research various resources in order to analyze information and determine appropriate responses to complicated or technical questions.
2. Ability to interpret and apply Wisconsin statutes, Administrative Code, contracts, policies and other technical resources related to benefit programs.
3. Ability to effectively and professionally communicate technical and complicated information to customers/members.
4. Knowledge of organizational/time management techniques.
5. Ability to prioritize work to meet deadlines or unanticipated needs or priorities.
6. Excellent customer service skills.
7. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
8. Ability to perform mathematical calculations.
9. Ability to establish positive, productive and efficient working relationships with a variety of persons at different levels within and outside the organization.
10. Highly developed oral and written communication skills.
11. Knowledge of benefit programs administered by the Department.
12. Knowledge of research methods and techniques.
13. Intermediate skill and ability to use personal computer-based software systems (e.g., Microsoft Windows applications such as Word, Excel, Access, etc.).
14. Accurate data entry skills.
15. Ability to train and audit work of other staff.

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16. Knowledge of strategic planning and goal setting techniques.
17. Ability to manage change and work in a rapidly changing environment.
18. Knowledge of standards and protocol for writing procedures.
19. Knowledge of confidentiality rules and procedures.
20. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.