POSITION #313004
Trust Funds Specialist – 100% (Appointment Focus)

POSITION SUMMARY:

Under close to limited supervision of the Retirement Planning & Outreach Section Supervisor, provide accurate and detailed information to members, their representatives and survivors about benefits administered by the Department of Employee Trust Funds (ETF). Analyze member records to determine eligibility and availability of benefits. Interpret and apply law, administrative code, and department policy.

The position spends a significant amount of time communicating benefit information to members over the phone, via online or virtual meetings, and in face to face meetings and requires developing and responding in writing to member requests. Most requests require math and analytical skills and the ability to follow complex processes and written procedures. The position requires the ability to be organized and effectively manage and prioritize daily work. With experience, the position assists training other staff, reviews the work of coworkers, revises work procedures, and provides other operational support. The information provided influences important life decisions of Wisconsin Retirement System members. This professional-level position requires exceptional skills in oral and written communications, customer service, and interpersonal relations. Requires frequent use of computers, calculators and other communication tools. 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 information about benefit programs and plans administered by the Department. Information is provided in-person, over the phone, and in writing.

Worker Activity

A.1 Communicate benefit information thoroughly and effectively. Explain alternatives to consider so members can make informed decisions about how to best use their available benefits.

A.2 Respond to inquiries about tax exemptions and taxability of benefits. Inform participants about the procedure for withholding taxes from benefits versus paying estimated taxes.

A.3 Assist participants in properly completing beneficiary designations to meet their needs and follow Department guidelines.

A.4 Maintain confidential information as required by law and rule and inform members the requirement and means to authorize release of information.

A.5 Take telephone requests for all types of benefit information, including estimates, applications, forms and brochures, documenting all information necessary to fill the requests.

A.6 Obtain needed information from persons reporting deaths without disclosing confidential information.

A.7 Provide general information about most benefit plans administered by the Department to interested parties such as employers, attorneys, legislators, other state agencies, retirement systems from other states, etc.

A.8 Inform members of the Department's Outreach & Education services. Schedule individual, group, or Outreach appointments.

40% GOAL B: Determination and explanation of eligibility requirements for benefit programs. Calculation and creation of retirement estimates.

B.1 Analyze member records and reported information to determine eligibility and entitlements for WRS benefits.

B.2 Explain military service credit requirements and procedures, how to obtain the necessary documentation of active military service, and how the service will impact available benefits.

B.3 Explain what service purchase is, when a person is eligible, how to make the purchase, any deadlines, the potential increase in Wisconsin Retirement System (WRS) benefits, factors affecting when to make the purchase, and making alternative investments until retirement.

B.4 Explain the department's processes, rules, and statutes surrounding divorce and the processing of Domestic Relations Orders (DRO). Explain the benefit consequences for the member and alternate payee.

B.5 Provide information to members with teaching credit in other states to help them decide whether to waive Wisconsin credit in order to maximize retirement income.

B.6 Explain health, life and other insurance programs including requirements for participation, coverage levels, premiums, application deadlines, open enrollment periods, and continuation/conversion of coverage.

B.7 Research and resolve exceptional and complex inquiries by analyzing and interpreting Wisconsin Statutes, Administrative Code, departmental policies, precedents and procedures as they pertain to ETF-administered benefit programs.

B.8 Create retirement and service purchase estimates according to current procedure.

B.9 Educate members about the use of the online calculators as tools to assist in benefit decisions such as projecting future benefit amounts.

B.10 Provide information to retirees regarding estimated benefit calculations, final computations, tax issues, annual dividends and other periodic changes to their benefit payments.

15% GOAL C: Pursuit of activities and most current information to maintain job knowledge through a continuous learning approach. Performance of functions that contribute to the ongoing growth and development of other staff. Provision of administrative support to the Member Services Bureau.

Worker Activity

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

C.2. Assist in training new and existing personnel.

C.3 Stay current on internal communications about changes that affect this position such as changes to benefit rights, policy, law, rule, process, and procedure.

C.4 Develop and/or revise written procedures as directed by supervisor. Recommend process improvements that provide value to the customer.

C.5 Review benefit communications for accuracy, completeness, and understandability. Recommend changes to the Written Communications Coordinator.

C.6 Participate on committees, workgroups, and project teams as assigned by a supervisor.

C.7 Perform other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES

1. Knowledge of organizational/time management techniques.

2. Excellent customer service skills.

3. Ability to prioritize work to meet deadlines or unanticipated needs or priorities.

4. Ability to research various resources in order to analyze information and determine appropriate responses to complicated or technical questions.

5. Ability to establish positive, productive and efficient working relationships with a variety of persons at different levels within and outside the organization.

6. Highly developed oral and written communication skills.

7. Ability to perform a sequence of mathematical calculations.

8. Excellent customer service skills.

9. Ability to effectively and professionally communicate technical and complicated information to customers/members.

10. Ability to interpret and apply Wisconsin statutes, Administrative Code, contracts, policies and other technical resources related to benefit programs.

11. Knowledge of benefit programs

12. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.

13. Knowledge of employee training needs assessment methods and techniques.

14. Ability to manage change and work in a rapidly changing environment.

15. Knowledge of procedure writing methods and techniques.

16. Knowledge of confidentiality rules and procedures.

17. Ability to train and audit work of other staff.

18. Intermediate skill and ability to use personal computer-based software systems (e.g., Microsoft Windows applications such as Word, Excel, Access, etc.).

19. Accurate data entry skills.

20. Knowledge of benefit programs administered by the Department.

21. Knowledge of strategic planning and goal setting techniques.

22. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.