

POSITION SUMMARY

Under close progressing to limited supervision of the Disability Programs Section Supervisor, this position documents, determines and evaluates disability benefits available at all levels under Wis. Stats. § 40.63 disability annuities, 40.65 duty disability and Long-Term Disability Insurance (LTDI) provided under the Wisconsin Retirement System.

In this position, emphasis is on claim processing and audit of WRS disability benefits. Communication by phone and in writing with multiple parties including but not limited to WRS participants, employers, attorneys, third-party administrators, physicians and others is extensive and requires a high attention to detail and ability to communicate complex disability benefits to others. This position has case management functions and evaluates disability applications for completeness and eligibility, suspends and terminates disability benefits based on medical and financial documentation, verifies life insurance and notifies employers of eligibility for group life insurance premium waiver, provides back up disability case management as needed, and provides detailed information, advice and counsel to applicants, personal representatives, attorneys, employers and others regarding the benefits and processes. In addition, this position provides disability program assistance to the Section Supervisor and/or Director as needed. As an employee of ETF, the incumbent will support and create a diverse and inclusive work force.

GOALS AND WORKER ACTIVITIES

40% GOAL A: Communication with disability benefit applicants, authorized representatives, employers, physicians and others to process disability claims.

- A.1 Obtain medical information provided by attending and Department-approved physicians to determine if medical evidence supports statutory definition of disability.
- A.2 Complete activities related to employer disability certification, including follow-ups with the employer as needed.
- A.3 Contact applicants or their authorized representatives and physicians by telephone or written correspondence to resolve discrepancies.
- A.4 Notify applicants of benefit determination outcome and appeal rights.
- A.5 Provide assistance to the Department's Division of Retirement Services counselors regarding disability benefits.

35% GOAL B: Performance of fiscal responsibilities to ensure proper disability benefit payments.

- B.1 Coordinate payments/offsets with the third - party administrator for ICI, LTDI, 40.63 and 40.65 benefits including overpayment management activities and use of STAR.
- B.2 Review third party administrator's annual income certifications and perform account maintenance based upon the results of the review.
- B.3 Suspend or terminate 40.63, 40.65 and other disability benefits based on statutory requirements and recalculate benefits as necessary to determine appropriate payment of benefits.
- B.4 Provide direction to vendor staff who support the disability benefit activities including correction of errors or interpretation.
- B.5 Compute, audit, and complete documents relating to duty disability, disability retirement and other WRS disability benefits.
- B.6 Compute benefit recalculations and determine appropriate account receivables and/or member refunds in relation to WRS disability benefits.
- B.7 Perform annual duty disability tax return and income statement calculations to reconcile duty disability benefits.
- B.8 Respond to internal and external calls, emails, faxes, and letters from ETF staff, WRS participants, attorneys and others regarding benefit eligibility, complex benefit calculations and recalculations and benefit overpayments.

20% GOAL C: Determination of disability benefit application (§40.63 and §40.65) eligibility.

- C.1 Evaluate applicant's creditable service data against the eligibility criteria for which he/she has applied.
- C.2 Determine eligibility for continuation of life insurance premium waiver.
- C.3 Obtain on-going medical evidence to substantiate continued disability benefit eligibility. Suspend and terminate benefits as identified as appropriate.

5% GOAL D: Provision of program assistance to the Section Supervisor and/or Director.

- D.1 Develop and revise forms and procedures as necessary.
- D.2 Provide input into statutory and administrative code changes affecting disability benefits.
- D.3 Assist in special projects as assigned.
- D.4 Participate in disability case file reviews.
- D.5 Provide back-up assistance to other Section staff as needed.

Knowledge, Skills and Abilities

1. Knowledge of state and federal laws, rules and regulations governing disability benefit programs.
2. Knowledge of WRS disability benefits and the complex calculation of those benefits.
3. Working knowledge of disability programs policies and procedures.
4. Skill in oral and written communication, especially handling difficult situations over the telephone.
5. Skill in establishing and maintaining effective contact and communication with various interest groups and individuals.
6. Intermediate skill in the use of computers and software systems and programs (e.g. Microsoft Office), particularly Word & Excel.
7. Ability to organize and manage multiple cases at the same time.
8. Ability to perform a sequence of mathematical calculations.
9. Ability to work in a team environment by actively working with others to achieve desired goals.
10. Skills to identify, recommend, and implement change to maximize efficiency.
11. Ability to work under pressure.
12. Ability to audit other case manager's work and communicate results in a positive manner even when complex issues have arisen.
13. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions

14. Excellent customer Service Skills
15. Knowledge and understanding of the mission, organization, and activities of the Wisconsin Retirement System.
16. Ability to maintain confidential information in accordance with policies, guidelines and direction from manager.
17. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.