

**Trust Funds Specialist - Objective
Disability Programs Section**

POSITION SUMMARY

Under general supervision of the Disability Programs Section Supervisor, this position independently determines, evaluates, communicates, documents, calculates, and maintains 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 claims review, processing, audit, and maintenance 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. This position has case management functions and evaluates disability applications and related documents for completeness and eligibility, reviews employer certification and reporting, calculates disability benefits, coordinates offsets to disability benefits including Income Continuation Insurance, completes annual earnings/income and medical reviews, verifies Health and Life Insurance and communicates to the employer, and suspends and terminates disability benefits based on medical and financial documentation. The position provides back up disability case management as needed and provides detailed information, advice, and counsel to applicants, personal representatives, attorneys, employers and others regarding disability benefits and processes. In addition, this position provides disability program assistance to the Section Supervisor and/or Director as needed.

GOALS AND WORKER ACTIVITIES

**40% GOAL A: Performance of fiscal responsibilities to ensure proper
disability benefit payments.**

- A.1 Coordinate payments/offsets with the third - party administrator for ICI, LTDI, 40.63 and 40.65 benefits including overpayment management activities.
- A.2 Review annual earnings statements and perform account maintenance based upon the results of the review.
- A.3 Perform annual duty disability tax return and income statement reviews and calculations to reconcile duty disability benefits.
- A.4 Compute benefit recalculations and determine appropriate account receivables and/or member refunds in relation to WRS disability benefits.
- A.5 Review and adjust offsets to duty disability benefits and complete the recalculation to determine appropriate payment of benefits.

- A.6 Review all taxable income, including SSA, Workers Compensation, and Unemployment Insurance to determine offset amounts to the duty disability benefit.
- A.7 Calculate the duty disability benefit by determining the gross monthly salary and incorporating all offsets and statutory reductions to determine the net benefit paid to the participant.
- A.8 Audit all monetary processing, calculations, and adjustments.

35% GOAL B: Communication with disability benefit applicants, authorized representatives, employers, physicians, and others to process disability claims.

- B.1 Communicate with disability applicants or their authorized representatives by telephone to discuss the disability claims process and requirements.
- B.2 Contact disability applicants or their authorized representative by telephone or written correspondence to resolve discrepancies.
- B.3 Correspond with licensed physicians for clarification on medical review discrepancies.
- B.4 Contact employers via email or telephone regarding discrepancies found with information provided to the Disability Programs Section relating, but not limited to, service and earnings, monthly salaries, overtime, termination dates, last day paid dates, and qualifying dates and criteria.
- B.5 Notify disability applicants of benefit determination outcome and appeal rights.
- B.6 Provide assistance to the Disability Section's Supervisor, Director, the Division of Benefits Administration counselors, and other sections of the agency regarding disability benefits.
- B.7 Respond to internal and external calls, emails, faxes, and letters from ETF staff, WRS participants, attorneys and others regarding benefit eligibility, complex benefit calculations/recalculations, and benefit overpayments.
- B.8 Provide direction to vendor staff who support the disability benefit activities including correction of errors or interpretation.
- B.9 Communicate with employers and ETF's Employer Services Bureau regarding Health Insurance, Life Insurance, and WRS Service and Earnings relating to disability claims.

- B.10 Follow-up with participants via telephone or written correspondence when non-compliant with returning required documents for annual reviews.

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

- C.1 Review disability applications for completeness and have amended if necessary.
- C.2 Evaluate applicant's creditable service data against the eligibility criteria for which they have applied.
- C.3 Evaluate medical information provided by licensed physicians to determine if medical evidence supports statutory definition of disability and contact physicians regarding discrepancies.
- C.4 Complete reviews of employer disability certifications, including follow-ups with the employer as needed.
- C.5 Ensure the correct termination date and last day paid is entered in our system correctly by the employer.
- C.6 Determine the qualifying date and qualifying criteria for duty disability claims.
- C.7 Review Compromise Agreements from Workers Compensation appeals, and process/update duty disability claims accordingly.
- C.8 Audit all determinations and corresponding documentation.
- C.9 Obtain on-going medical evidence to substantiate continued disability benefit eligibility.
- C. 10 Suspend or terminate 40.63, 40.65 and other disability benefits based on statutory requirements.
- C.11 Work with the Office of Legal Services on appealed disability claims.

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

- D.1 Suggest and help implement ways to improve the customer experience.
- D.2 Provide input into statutory and administrative code changes affecting disability benefits.

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- D.3 Assist in special projects as assigned.
- D.4 Develop and revise forms and procedures as necessary.
- D.5 Participate in disability case file reviews.
- D.6 Provide back-up assistance to other Section staff as needed.
- D.7 Assist with training as needed.

(Revised 5/16/2025)

Knowledge, Skills, and Abilities

1. Knowledge of state and federal laws 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. Ability to use complex and sophisticated computer-based software systems including Microsoft Office.
7. Ability to organize and manage multiple cases at the same time.
8. Ability to perform a sequence of mathematical calculations.
9. Capability to work in a team environment by actively working with others to achieve desired goals.
10. Ability to audit other case managers work and communicate results in a positive manner even when complex issues arise.
11. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
12. Ability to acquire and apply new knowledge and skills for work.
13. Ability to adapt to departmental transformation along with changing priorities within the section.
14. Skill to identify, recommend, and implement change to maximize efficiency.
15. Ability to handle multiple priorities at once and work effectively under pressure.

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16. Ability to learn and apply departmental compliance policies, practices, and procedures.
17. Knowledge and understanding of the mission, organization, and activities of the Wisconsin Retirement System.
18. Understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.
19. Ability to establish productive and efficient working relationships.
20. Ability to maintain confidential information in accordance with policies, guidelines and directions from manager.