

Position **015022**

Trust Funds Specialist-Objective – Employer Services – WRS Unit

## **POSITION SUMMARY**

Under general supervision within the Employer Services Section (ESS) within the Employer and Contact Services Bureau (ECSB) this position provides detailed information to Wisconsin Retirement System (WRS) participating employers and members, Department staff, and other interested parties related to WRS reporting, member account maintenance, questions, and issue resolution. Employer and Contact Services Bureau provides services to over 600,000 active, inactive, and annuitant participants in the WRS, over 1500 public employers participating in the WRS, and additional public employers covered under Wisconsin's Section 218 Agreement with the Social Security Administration for purposes of providing Social Security coverage for Wisconsin public employees.

The incumbent will communicate benefit program (WRS) information thoroughly and explain eligibility requirements, reportability of service and earnings, and deadlines. This position requires the ability to research and respond to intricate program and reporting questions. Communication occurs in the form of telephone conversations or written responses. In addition, the incumbent provides issue resolution, including analyzing problem situations, developing proposals for corrective action, and conducting research for the most sensitive and/or complicated situations. This position requires exceptional skills in research and analysis, oral and written communications, public relations, and customer service. Work requires the frequent use of a personal computer to access information contained in various mainframe and software programs.

## **GOALS AND WORKER ACTIVITIES**

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|-----|-------------------------------|--|
| 50% | GOAL A:<br>Worker<br>Activity | Provision of detailed WRS reporting requirements to employers  |
|     | A.1                           | Interact with employers on WRS employee transaction reporting for purposes of resolving service credit, earnings and/or termination date issues. Provide issue resolution information and assist employers with reporting instructions.  |
|     | A.2                           | Work in conjunction with policy analysts to research statutes, rules, policies, and participant records for use in responding to employer and member questions.  |
|     | A.3                           | Contact employers to resolve WRS reportable earnings issues for purposes of ensuring the timely and accurate generation of retirement benefit estimates for participants contemplating retirement. Instruct employer on statutory requirements for reporting WRS earnings and request updated reports as needed. |

- A.4 Contact employers to resolve complicated situations involving employee termination date discrepancies (i.e., involuntary terminations, leaves of absence, lay-offs, etc.) Instruct employer on the requirements for determining the appropriate date of termination and request the necessary documentation when necessary.
- A.5 Respond to, or follow-up with, participant inquiries related to discrepancies with data reported by their employers. After reviewing all data and discussing issues with the employee and employer, recommend issue resolution to supervisor and, upon decision, communicate results to the participant and the employer.
- A.6 Contact WRS employers to resolve irregular service credit patterns identified by internal systems and/or benefit inquiries. Prepare adjusting entries and update participant record based on results.
- A.7 Process late reported earnings and service corrections that are submitted by employers, along with corrections that need to be manually processed through the Late Reported Adjustment Processor. Document and process corrections provided to us by employers to make corrections to late reported invoices.
- A.8 Document issues, alternatives and resolution decisions in writing and effectively explain statutory, rule, policy and/or contractual requirements.
- A.9 Provide input to the Employer Trainer for use in formal training sessions for employers or other sources, such as payroll vendors, state central payroll representatives, etc.

25% GOAL B:  
Worker  
Activity

Provision of WRS eligibility and enrollment information to employers

- B.1 Provide detailed information to employers about the WRS and applicable systems. Review enrollment applications to ensure all statutory, contract, and Administrative Code requirements are met. Provide issue resolution information and assist employers with reporting instructions.
- B.2 Analyze and research employer enrollment errors relating to participant eligibility to participate the WRS. Provide resolution in writing to employers and participants regarding eligibility determination.

B.3 Counsel employers regarding employee eligibility criteria for participation in the WRS.

15% GOAL C: Provision of support and assistance to participating employers during WRS annual reconciliation

Worker  
Activity

C.1 Reconcile earnings reported for the WRS with those earnings reported by employment category on the contribution system.

C.2 Contact the employer in cases where resolving the discrepancy cannot be done from the data available.

C.3 Prepare adjusting entries or adjusted contribution reports to resolve such discrepancies.

10% GOAL D: Completion of other assignments and unit support

Worker  
Activity

D.1 Assist in the update/development of procedures applicable to work assignments.

D.2 Prepare statistical and other management information as required.

D.3 Provide input on customer services and recommend improvements to supervisor.

D.4 Participate in staff meetings and training programs.

D.5 Assist with employer training in order to educate employers about current issues, administrative changes in programs, statutes, and rules, to increase employer knowledge and skills applicable to the administration of the WRS.

D.6 Complete other tasks as assigned by the supervisor.

**KNOWLEDGE, SKILLS, and ABILITIES**

1. Knowledge and skill in planning and organizing work to meet deadlines or unanticipated needs or priorities.
2. Skill in clear and effective written and oral communication in order to communicate technical and detailed information in easy to understand terms.
3. Ability to establish productive and efficient working relationships with a variety of persons at different levels within and outside the organization.
4. Knowledge of benefit programs administered by the Department.
5. Ability to perform accurate math calculations.
6. Ability to collect, verify, input, and retrieve data from automated systems and manual process.
7. Ability to reconcile data.
8. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
9. Excellent customer service skills.
10. Ability to interpret Wisconsin statutes, administrative rules, contracts and policies related to benefit programs.
11. Intermediate skill and ability to use personal computer-based software systems (e.g., Microsoft Windows applications such as Word, Excel, Access, etc.).
12. Knowledge of procedure writing techniques.
13. Ability to maintain confidential information in accordance with policies, guidelines and direction from manager.
14. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.