

Position #014745

**DRS/ECSB/Employer Services Section, Retiree Health Insurance Unit
Trust Funds Specialist**

14. POSITION SUMMARY:

Under the close to limited supervision of the Employer and Contact Services Bureau Employer Services Section, Insurance Unit Supervisor, this position utilizes a case management approach to provide benefit and insurance services to a subset of the annuitant, member, and employer populations. Provides detailed information to Wisconsin Retirement System (WRS) annuitants (inclusive of their representatives, survivors, dependents, beneficiaries, attorneys, POAs, legal guardians, financial institution representatives, tax agencies, and health insurance carriers), members, and employers. This position has the following key responsibilities: analyze participant records to determine health insurance and sick leave eligibility and entitlement; research complex health insurance and sick leave questions and communicates the results and available options; and reconcile health insurance invoices to appropriate ETF systems and assist employers with reconciliation questions related to their invoices for insurances offered.

The incumbent will communicate benefit program (WRS, health, life and ICI) information thoroughly and explain options available, eligibility requirements and application deadlines to WRS participating employers and members, Department staff, and other interested parties. This position requires the ability to research and respond to technical program and reporting related questions. Communication occurs in the form of telephone conversations or written responses. The position requires the incumbent to independently analyze problem situations and conduct research for the most sensitive and/or complicated situations, such as determination denials and system integrity issues, provide issue resolution, and develop proposals for corrective action. This position participates and serves as a subject matter expert on projects to automate, enhance, and/or streamline new or existing processes, division/department/bureau policy review, and other initiatives.

This position requires knowledge and application of statutes, Administrative Code and departmental policies, procedures and precedents related to annuitant health insurance, sick leave, life insurance, ICI, and WRS benefits and reconciliation of invoices. 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 computer to access information contained in various mainframe and software programs.

15. GOALS AND WORKER ACTIVITIES:

50% GOAL A: Provision of detailed insurance and sick leave information to annuitants, their representatives and survivors

Worker
Activity

- A.1 Respond to verbal and written inquiries from annuitants, their representatives, survivors, etc. regarding detailed and/or complicated annuitant health insurance and sick leave issues including requirements for participation, application deadlines, premiums, coverage options, open enrollment periods, escrow requirements, etc.

- A.2 Research, interpret, analyze and appropriately apply relevant statutes, Administrative Code, and departmental policies, precedents and procedures for retirees in order to process applicable forms. Communicate with other department personnel as necessary to confirm, clarify or interpret department policy.
- A.3 Research, interpret, and determine continuant, annuitant, and survivor eligibility to continue health insurance coverage based on applicable relevant statutes, Administrative Code, and departmental policies, precedents and procedures. As needed, update appropriate department systems to establish, maintain, and terminate insurance contracts.
- A.4 Communicate directly via telephone and/or in writing with annuitants, their representatives, survivors, and other internal and external contacts to resolve health insurance and/or sick leave eligibility, coverage, and premium payment issues. As needed, update funding sources for insurance contracts in appropriate systems.
- A.5 Review file feeds from Voluntary Data Sharing Agreement (VDSA) and update member accounts as needed to remain in sync with Centers for Medicare and Medicaid Services (CMS). Review files from Navitus to maintain correct Medicare pharmacy benefits.

25% GOAL B: Provision of detailed insurance information to active members and employers
Worker
Activity

- B.1 Respond to inquiries from employers regarding eligibility and reporting criteria for all insurance programs administered by the department.
- B.2 Research, analyze, and interpret participant records, rules, policies, Federal and State administrative code, and contract provisions for use in responding to employer and member questions, issue and eligibility resolution.
- B.3 Communicate with employers to resolve the most complex issues related to the insurance programs and their administration of those programs, and their eligibility for the programs.
- B.4 Provide back-up support for issue resolution information and assistance to participating employers related to the resolution of employer errors for life and ICI.
- B.5 Provide back-up support to assist employers with determining if they wish to participate in the various insurance programs offered by the State and with the resolution process if they elect to seek to participate.

10% GOAL C: Participation in policy and process reviews and implementation

Worker
Activity

- C.1 Represent the section/bureau operations and participate in policy/process review exercises, business re-engineering and cross-functional discussions to analyze process and system improvements as they relate to strategic plan objectives.
- C.2 Identify opportunities and collect input from stakeholders for improvements in section/bureau processes, changes needed to implement business re-engineering and/or strategic plan objectives, and proposed statutory and administrative code language changes to enhance service and efficiency. Evaluate alternatives, develop conclusions and make recommendations.
- C.3 Represent the section in projects aimed toward automating or enhancing existing activities and tasks, developing and implementing strategic plan objectives, etc.
- C.4 Participate in testing of system changes and new system development.
- C.5 Assist the Legislative Audit Bureau (LAB) with annual review of the ETF systems.

10% GOAL D: Provision of support and assistance for participating employers and retirees during peak reporting times of the year such as the It's Your Choice enrollment period.

Worker
Activity

- D.1 Assist employers and retirees with enrollment, eligibility, and system questions related to processing applications submitted by employees and local paid annuitants.
- D.2 Contact the employer or retiree in cases where resolving the discrepancy cannot be done from the data available.
- D.3 Make enrollment changes as needed when the employer or retiree is not capable of doing so.

Position #014745

Page 4

5% GOAL E: Completion of other assignments and unit support.

Worker

Activity

- E.1 Review, recommend and develop changes to section policies and procedures; draft procedures.
- E.2 Recommend, review and provide input on the creation and improvement of forms used by the section.
- E.3 Train and audit the work of new staff as directed. Monitor progress of assigned trainee(s), respond to questions and keep Section Chief and lead worker informed of any concerns and/or problems. Recommend improvements to section training plans.
- E.4 Provide training on new/changing procedures to affected staff within and outside the Section as directed.
- E.5 Assist and support other areas of the Employer and Contact Services Bureau as directed.
- E.6 Participate in staff meetings and training programs.
- E.7 Assist with the maintenance of AcSL generated letters/mailers and daily review of AcSL System assurance reports.

KNOWLEDGE, SKILLS AND ABILITIES:

1. Ability to research, analyze and interpret Wisconsin statutes, Administrative Code and other technical resources related to ETF administered programs.
2. Ability to reconcile data.
3. Knowledge and skill in planning and organizing work to meet deadlines or unanticipated needs or priorities.
4. Ability to interact positively with a variety of persons at different levels within and outside the organization.
5. Excellent customer service skills.
6. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
7. Ability to establish productive and efficient working relationships.
8. Clear and effective written and oral communication skills in order to communicate technical and detailed information in easy to understand terms.
9. Knowledge of benefit programs administered by the Department.
10. Knowledge of research methods and techniques.
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 methods and techniques.
13. Ability to train and audit work of other staff.
14. Knowledge of strategic planning and goal setting techniques.
15. Ability to manage change and work in a rapidly changing environment.
16. Ability to perform mathematical calculations.
17. Knowledge of confidentiality rules and procedures.
18. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.