



THE CITY OF LOS ANGELES

CIVIL SERVICE COMMISSION

CLASS SPECIFICATION

04/13/06

BENEFITS SPECIALIST, 1203

Summary of Duties: Counsels members and beneficiaries of a City defined benefits system or defined contribution savings plan about voluntary service retirement, disability and death benefits, and other retirement or benefit related provisions; researches, resolves and processes benefit claims; may assign, review and evaluate the work of subordinates engaged in support activities for this work; applies sound supervisory principles and techniques in building and maintaining an effective work force; fulfills equal employment opportunity responsibilities; and does related work.

Distinguishing Features: An employee in this class works under general supervision and exercises considerable independent judgment in explaining rights and responsibilities relative to the City's defined benefit retirement systems or defined contribution savings plans. Employees in this class are required to interpret Federal, State and local laws governing pension benefit or defined contribution plans in counseling members and beneficiaries. Errors in this work can result in significant financial and legal consequences.

Incumbents in the class of Benefits Specialist, as bona fide supervisors, are responsible for the performance of the full range of supervisory activities including the application of discipline, processing and resolution of grievances and evaluation of performance.

Examples of Duties: A Benefits Specialist:

- Counsels members and beneficiaries on benefit options, service retirement, disability and death benefits, deferral of benefits, withdrawals, and reciprocal provisions as they may apply to a defined benefit or defined contribution plan;
- Explains legal requirements and consequences in divorce, rights of future heirs of ex-spouses, community property, child support, domestic partnerships, and other issues that may be unique to individual retirees;
- Advises retirees on their rights to complete contracts in progress and/or the opportunity to purchase additional service credit through various buy back programs;
- Explains benefit continuance provisions to members and beneficiaries;
- Counsels non-eligible spouses and domestic partners;
- Ensures that all relevant documents such as birth and death certificates and marriage certificates and dissolutions are collected;
- Enters counseling related information into data bases;
- Presents benefits information to groups;
- Prepares a variety of reports and correspondence related to benefits counseling;
- May perform routine calculation of benefits;
- May supervise the activities of a staff engaged in compiling service credit and/or disability or death claim data;

- May supervise the activities of a staff engaged in providing call center services for members;
- Communicates equal employment opportunity information to employees;
- Applies job-related criteria in selecting, orienting, assigning, training, counseling, evaluating and disciplining subordinates;
- Assists employees in preparing for promotion as described in the City's Equal Employment Opportunity Program.

May occasionally be assigned to other duties for training purposes or to meet technological changes or emergencies.

Qualifications: Incumbents must have the following knowledge and abilities:

Knowledge of:

- State, Federal, and local laws governing defined benefit retirement benefits or defined contribution plans;
- City Charter and Administrative Code provisions, and City Attorney opinions, related to defined benefit retirement systems and benefits or defined contribution plans;
- Database management systems used in retirement benefit administration;
- Effective member counseling techniques;
- Arithmetic sufficient to calculate member benefits; and
- City personnel rules, policies and procedures.

The ability to:

- Learn, interpret, and apply laws, policies and procedures;
- Interact tactfully and effectively with a wide variety of people in counseling and other types of situations;
- Make effective oral presentations to groups; and
- Prepare effective written communications necessary for corresponding with members and staff personnel.

Minimum Requirements: Two years of full time paid experience in a class at least at the level of Senior Clerk Typist in the administration of employee benefit programs, including counseling members, researching retirement or benefit related information, or performing retirement or benefit related calculations, and using computers to obtain appropriate data.

Licenses: A valid California driver's license may be required for some positions.

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depend, in part, on the specific requirements for the job, the limitations related to the disability, and the ability of the hiring department to reasonably accommodate the limitation.

As provided in Civil Service Commission Rule 2.5 and Section 4.55 of the Administrative Code, this specification is descriptive, explanatory and not restrictive. It is not intended to declare what all of the duties, responsibilities, and required qualifications of any position shall be.