

BENEFITS SPECIALIST (1203)
TASK LIST - 2023

1. Informs members and beneficiaries on benefit services, such as health, dental, and vision benefit options, such as service retirement, continuance provisions, disability and/or survivor benefits, deferral of benefits, withdrawals, and reciprocal provisions as they may apply to a defined benefit or defined contribution plan, in order to provide members and beneficiaries a full understanding of benefits.
2. Explains legal documentation required by the benefit and retirement plans in cases of plan enrollment, dissolution and employment transitions, which cover requirements, such as health, dental and vision benefits, rights of future heirs of ex-spouses, community property, child support, domestic partnerships, and other issues that may be unique to individual retirees or employees, in order to provide a full understanding to members and beneficiaries.
3. Calculates cost of benefits and informs members of their rights, such as the right to complete contracts in progress and/or the opportunity to purchase additional service credit through various buyback programs, in order to ensure members are informed of all benefits available to them.
4. Ensures that all relevant legal documentation such as birth, death, and marriage certificates, dissolutions, social security cards, and identification are collected and stored in the appropriate record keeping system, in order to establish membership requirements so they can receive benefits.
5. Enters member contact information and correspondence, such as email/letter correspondence, activity that occurred, updates on assistance into computer databases, such as City Payroll system, the Paris Program, Pension Gold, and propriety third party record keeping systems, in order to keep record of conversations and to ensure all departmental processes are being appropriately carried out.
6. Presents benefits information, such as outreach, seminars, webinars, training sessions on member benefits and forms, financial planning, the retirement process including forms and benefits, new employee orientations for groups such as newly enrolled employees, upcoming retirees and retiring employees, in order to inform of the most updated benefits and ensure the appropriate documentation.
7. Writes correspondence related to benefit programs, such as requesting missing information, making determinations about benefit eligibility, and correcting

records of contact information, in order to communicate with members and beneficiaries.

8. Runs and generates reports, such as benefit enrollment information, payroll adjustments, benefits premiums, and administration of benefits, in order to resolve member issues.
9. Performs routine calculation of benefits, such as by analyzing Memoranda of Understandings (MOU), salary history, account summaries, service credit, and employment status using proprietary software such as Excel, Pension Gold, Clearview Pension Administration Solution (CPAS)/Paris Program and third party record keeping systems, in order to establish the appropriate benefit amounts.
10. Supervises and evaluates employee performance by training, reviewing work, monitoring job progress, communicating with, and guiding employees, in order to ensure timely completion of work that is consistent with departmental and program standards.
11. Applies job related criteria to determine employee selection and assignment; trains employees on processes and procedures, in order to ensure the success of the department.
12. Develops and supports employees by assisting employees in preparation for promotion; listening to employee grievances, handling disputes fairly and objectively; counsels and provides discipline as necessary; and fairly and accurately evaluates employees, in order to apply Equal Employment Opportunity (EEO) principles.
13. Works with other retirement plans, government agencies, and contracted service providers, such as software vendors, investigative service vendors, and insurance providers, and reviews employee records such as employment status, in order to compile service credit and/or disability or death claim data in order to transact rollovers, determine employee eligibility to set up retirement, and audit health, dental, vision, and life benefits.
14. Creates and innovates documents or references to provide information such as benefit information and retirement eligibility, in order to educate members.