

ILLINOIS DEPARTMENT OF CENTRAL MANAGEMENT SERVICES
CLASS SPECIFICATION

PENSION AND DEATH BENEFITS TECHNICIAN I

POSITION CODE: 30961

Effective: 10-1-87

DISTINGUISHING FEATURES OF WORK:

Under direct supervision, learns and becomes familiar with the State Employees' Retirement System's pension and death benefits regulations, procedures, and calculations through the processing of cases involving a limited number of employee groups, eligibility formulas, and other retirement systems; completes assignments within established guidelines with all results being verified by a higher level technician or supervisor.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Obtains and reviews documents such as benefit applications, agencies' certifications, birth and death certificates, and Social Security information to determine eligibility for retirement, survivors, widows, occupational deaths, nonoccupational deaths, or death benefits after retirement pursuant to the statutes governing the State Employees' Retirement System; applies eligibility requirements to a small number of distinct employee groups and their dependents within the statutes, rules, regulations, policies and procedures in effect at the time of the individual's employment.
2. Calculates and/or verifies calculations for numerous types of retirement and death benefits pursuant to the statutes governing the State Employees' Retirement System; enters information into the automated on-line benefit calculation system; computes and pre-verifies Federal Capital Gains and ordinary income taxes; computes employment service and earnings.
3. Communicates with internal accounting staff and external agency payroll and/or retirement coordinators to obtain payroll and employment data; provides external agency personnel with routine retirement and death benefit information; provides guidance and assistance to state employees and dependents concerning retirement and death benefits; processes routine telephone inquiries from employees and dependents, interviews benefit recipients with routine benefit problems, and resolves same.
4. Corresponds and exchanges information, with several small public retirement systems in the State, regarding the coordination of retirement and death benefits between systems; calculates retirement and death benefits pursuant to the Retirement Systems' Reciprocal Act.
5. Obtains, reviews and interprets Social Security retirement and death benefit information used in the coordinated offset benefit plan administered by the State Employees' Retirement System; obtains, reviews and interprets death benefit information from state workers' compensation agencies for offset and benefit reduction purposes.

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6. Participates in group meetings with internal staff and other interested groups to review benefits, procedures, and methods relative to new legislative measures; attends seminars and/or training classes relating to pension and death eligibility and calculations.
7. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.

DESIRABLE REQUIREMENTS:

Education and Experience

Requires knowledge, skill and mental development equivalent to the completion of two years of college with courses in mathematics, basic statistics, and/or business administration, and one year of technical experience in the calculation of private or public pension and/or death benefits.

Knowledges, Skills and Abilities

Requires elementary knowledge of the general procedures and methods used to calculate pension and death benefits.

Requires elementary knowledge of the Social Security retirement and death benefit structure.

Requires elementary knowledge of workers' compensation death benefit laws.

Requires elementary knowledge of the federal tax laws applying to public pension funds.

Requires elementary knowledge of the Retirement Systems' Reciprocal Act.

Requires ability to read, assimilate and recall written and numerical information.

Requires ability to perform detailed work involving written or numerical data and to make arithmetical calculations rapidly and accurately.

Requires ability to make decisions in accordance with the laws, rules and regulations governing the State Employees' Retirement System.

Requires ability to examine, extract and record pertinent claims information from a variety of source documents.

Requires ability to explain and interpret benefits procedures to state employees and their dependents.

Requires ability to learn the use and operation of the automated on-line benefits calculation system.

Requires ability to learn and apply the eligibility requirements and calculations used to compute pension and death benefits.

Requires ability to present calculation results clearly in written and verbal form.

Requires ability to maintain satisfactory working relationships with state employees, dependents, representatives of other retirement systems, and coworkers.