

ILLINOIS DEPARTMENT OF CENTRAL MANAGEMENT SERVICES
CLASS SPECIFICATION

PENSION AND DEATH BENEFITS TECHNICIAN II

POSITION CODE: 30962
Effective: 4-1-97

DISTINGUISHING FEATURES OF WORK:

Under general supervision, determines eligibility for pension and death benefits and independently performs pension and death benefits calculations conforming to the Illinois Pension Code; completes assignments encompassing the entire scope of computations and eligibility requirements; applies special formulas and procedures to specific retirement groups; and independently coordinates benefits with other public retirement systems in the State.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Obtains, reviews and verifies documents such as benefit applications, agency certificates, birth and death certificates, and Social Security information to determine eligibility for retirement, survivors, widows, occupational death, non-occupational death, or death benefits after retirement pursuant to the statutes governing the State Employees' Retirement System; applies eligibility requirements to all distinct employment groups and their dependents within the statutes, rules, regulations, policies and procedures in effect at the time of the individual's employment; determines eligibility for benefit payment, in conjunction with the unit supervisor in cases not specifically covered by statutes or rules.
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; calculates and verifies atypical benefits.
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 and/or complex retirement and death benefit information; provides guidance and assistance to state employees and dependents concerning retirement and death benefits; processes routine and/or complex telephone inquiries from employees and dependents, interviews benefit recipients with routine and/or complex benefit problems, and resolves same; communicates with special retirement formula groups to provide specialized, timely and accurate information unique to each group.
4. Corresponds and exchanges information with twelve other public retirement systems in the State regarding the coordination of retirement and death benefits between systems; certifies and exchanges employment service and earnings information with other public retirement systems; verifies reciprocal retirement and death calculations; calculates retirement and death benefits pursuant to the Retirement Systems' Reciprocal Act; attends the annual Reciprocal Training Conference to review new developments with other retirement systems.
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.
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.

PENSION AND DEATH BENEFITS TECHNICIAN II (Continued)

7. Assists the unit supervisor and data processing personnel in the development of improved methods for the automated calculations system; assists the unit supervisor with the accumulation of test case materials used to verify the accuracy of new or revised system applications; selects and verifies unique types of calculation data in preparation for the issuance of active and inactive benefit statements produced annually.
8. 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 four 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 working knowledge of the procedures and methods used to calculate state employees' pension and death benefits.

Requires working knowledge of the Illinois Pension Code, Chapter 108-1/2, Article 14.

Requires working knowledge of the special employee groups, eligibility requirements, and formulas used in the State Employees' Retirement System.

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

Requires working knowledge of the Retirement Systems' Reciprocal Act.

Requires working knowledge of other retirement systems.

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

Requires working knowledge of workers' compensation death benefit laws.

Requires ability to independently calculate pension and death benefits pertaining to all the distinct employee groups in the State Employees' Retirement System.

Requires ability to efficiently operate the automated on-line benefits calculation system.

Requires ability to verify the work of lower level technicians.

Requires ability to coordinate benefit calculations with other public retirement systems.

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 benefit procedures to state employees and their dependents.

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.