RETIREMENT COUNSELOR 1 0841

GENERAL DESCRIPTION OF CLASS

The RETIREMENT COUNSELOR 1 determines general retirement eligibility and benefits; computes and processes benefit payments and estimates of benefit entitlements; provides general counsel to members, beneficiaries and employers on rights and benefits.

DISTINGUISHING FEATURES

This is the first level of a two-level series. It is distinguished from the higher level by providing general information to members, beneficiaries, retirees, and employers and with limited responsibility for in-depth involvement with employers, members, and employees through interpretation of laws, rules, and regulations.

DUTIES AND RESPONSIBILITIES

Allocation of positions to this class will depend on the total work performed which may include one or a combination of the duties or tasks listed below.

1. **Correspondence.** Typical tasks: composes general correspondence to obtain and give information relating to service credit reconstruction, membership eligibility, invoices, and documentation.

2. **Analysis of Law.** Typical tasks: applies Oregon Revised Statutes and Oregon Administrative Rules as pertaining to retirement benefit plans.

3. **Calculations.** Typical tasks: calculates and advises members of rights and costs to acquire or reestablish service credit; calculates estimates of benefit entitlements and benefit estimates for active, inactive, and retired members; completes accounting transactions to implement and maintain payment of the benefits; calculates general estimates of benefits and benefit entitlements for members applying for disability benefits and for disabled members; counsels members on rights and obligations under Oregon retirement law as pertains to disability; completes necessary accounting transactions to create, maintain, and discontinue disability payments.

4. **Counseling.** Typical tasks: provides routine retirement counseling to active, inactive, disabled, retired members, and employers, both in person and on the phone, regarding their rights and benefits, provisions of the law, and regulations governing the Oregon Public Employes Retirement System; assists members in PERS retirement and benefits planning.

5. **Payroll Audits.** Typical tasks: conducts payroll audits and employers' manual and computerized reporting systems to isolate errors and discrepancies and initiate corrective actions.

6. **Training.** Typical tasks: conducts training sessions with employer groups, individual employers when topics are agency specific, with member groups, and with the general public; provides training and instruction to support level employees as assigned.

7. **Death Benefit Eligibility/Beneficiaries.** Typical tasks: evaluates active, dormant, and retired member records to determine death benefit eligibility and beneficiary of record; counsels beneficiaries on rights and obligations under Oregon Retirement system law; calculates payment amounts due and completes necessary accounting transactions to initiate and maintain payment.

8. **Member Account Review.** Typical tasks: Review active and retired member accounts and recommend corrective action.

RELATIONSHIPS WITH OTHERS

Employees in this classification have daily in-person, telephone, or written contact with agency staff and management, technical staff, members, and other public employers, in order to exchange information, address procedural questions, collect data, make recommendations and clarifications, secure approvals, provide assistance, and solve problems. Topics include legalities, regulations, status, and appropriateness.

SUPERVISION RECEIVED

Employees in this classification receive general supervision from an administrative superior who assigns work orally or through written instructions. Work is periodically reviewed by Retirement Counselor 2 or supervisor for guidance, accuracy, and conformance to established PERS policies and procedures.

GENERAL INFORMATION

Employees in this class work at various counseling centers and headquarter locations throughout the State. Some positions may require occasional travel, overnight stays, or working alone in a one-counselor office. Some positions may require the willingness to work within the environment associated with the position's location.

KNOWLEDGE, SKILLS, AND ABILITIES (KSA)

General knowledge of basic accounting and auditing procedures.

Skill in conducting interviewing and counseling sessions.
Skill in communicating orally and in writing with a variety of people, answering questions, and explaining information.

Ability to interpret laws, rules, and regulations.
Ability to make effective oral presentations of retirement system subject matter.
Ability to work in a one-person office.
Ability to establish and maintain harmonious working relationship with the public, fellow employees, and professionals.

NOTE: The KNOWLEDGE and SKILLS are required for initial consideration. ABILITIES may be required for initial consideration, at any time during the selection process, or during a trial service period as a final stage of the selection process. Some duties performed by positions in this class may require different KSA's. No attempt is made to describe every KSA required for **all** positions in this class. Additional KSA requirements will be explained on the recruiting announcement.

Adopted 4/90

Revised

Examples of work are typical of duties assigned to this class. No attempt is made to describe every duty performed by all positions in this class.