

**GENERAL DESCRIPTION OF CLASS**

The RETIREMENT COUNSELOR 2 leads a team of Retirement Counselor 1's and support employees; reviews disability claims and recommends affirmance or denial; reviews contested cases and recommends affirmance or denial; develops and presents training materials to participating employers; develops and presents training materials to employee members and to the general public; conducts payroll audits of participating employers; acts as expert witness in marriage dissolution proceedings.

**DISTINGUISHING FEATURES**

This is the second level of a two-level series. It is distinguished from the lower level series by decision making and the responsibility for analyzing and interpreting laws, rules, regulations, and by the complexity of interactions with employers, members, and employees.

**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 complex and technical correspondence in obtaining and giving information relative to service credit, membership eligibility, service credit restoration, invoices and documentation; writes or assists in the writing of desk procedures, agency procedures, guidelines and rules, and employer/employee informational releases.
2. **Analysis of Laws.** Typical tasks: provides analysis and interpretation for agency according to agency guidelines, Oregon Revised Statutes, Administrative Rules, United States Tax law (specifically Internal Revenue Code Sections 401 to 415), and United States statute concerning the Federal Insurance Contributions Act (Social Security law) as they pertain to retirement benefit plans.
3. **Calculations.** Typical tasks: reviews calculations of Retirement Counselor 1's; calculates estimates of benefit entitlements and benefit estimates for active, inactive, and retired members in complex cases; authorizes accounting transactions to implement, maintain, or adjust payment of the benefits; calculates complex (as well as general) estimates of benefits and benefit entitlements for members applying for disability benefits and for disabled members; counsel members on rights and obligations under Oregon retirement law as pertaining to disability in complex cases; authorizes necessary accounting transactions to create, maintain, and discontinue disability payments.
4. **Payroll Audits.** Typical tasks: conducts payroll audits of employers' manual and computerized reporting systems to isolate and correct errors and discrepancies and initiate corrective actions; recommends application or waiver of applicable penalty assessments, and may recommend system adjustment to the employer.
5. **Training.** Typical tasks: develops training materials, coordinates, plans, and conducts training or informational sessions with employer groups, individual employers, member groups, and the general public; provides periodic training and daily instruction to Retirement Counselor 1's and section support staff.

- 6. Employer Contracts.** Typical tasks: provides interpretation of employer contracts regarding salary and fringe benefits, which can effect final average salary computation to ensure compliance; provides interpretation of integration agreements with new employers who have existing plans, and assists with their negotiations.
- 7. Contested Benefits.** Typical tasks: evaluates evidence and audits records regarding member's contested benefit claims; recommends approval or denial to appropriate manager; advises parties adversely affected of reasons for denial and of appropriate appeals process.
- 8. Member Account Adjustments.** Typical tasks: reviews adjustments to active and retired member accounts; authorizes corrections to system, plan, service credit and contribution records, and authorizes billing and refund transactions.
- 9. Disabilities.** Typical tasks: evaluates evidence and records compiled regarding member's claim for disability; recommends approval or denial to Board; counsels members applying for disability retirement, and disabled members on all rights and obligations under Oregon retirement law; calculates one-time and recurring disability benefit amounts; authorizes necessary accounting transactions to create, maintain, and discontinue disability payments; periodically evaluates recurring accounts to determine on-going eligibility status; serves as Agency witness in hearings on denied disability claims; advises parties adversely affected of right to appeal.
- 10. Counseling.** Typical tasks: counsels active, inactive, disabled, and retired members, employers, attorneys, etc., regarding complex, detailed retirement calculations and interpretation of Oregon Revised Statutes, Oregon Administrative Rules, United States Internal Revenue Code, and Social Security Administration.
- 11. Coordination of Activities.** Typical tasks: coordinates problem definition and resolution between employers, members, and the Public Employees Retirement System; resolves discrepancies and conflicts; coordinates automated sub-system administration, maintenance, and balancing procedures; coordinates with other other sections of agency regarding timeliness and accuracy of system reports and actions; serves on intra-agency committees on implementation of new Statutes and Rules; serves on task forces.
- 12. Retirement System Representation.** Typical tasks: represents the Retirement System in divorce and other legal proceedings; provides expert testimony concerning current and future benefit entitlements.

## RELATIONSHIPS WITH OTHERS

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

Some employees in this class have frequent telephone or written contact with private attorneys and judges, and respond to inquiries regarding contested cases or hearing requests.

## SUPERVISION RECEIVED

Employees in this classification receive limited supervision from an administrative superior. Employees work independently and must exercise judgment in administering agency policy and solving day-to-day problems. Work is periodically reviewed upon completion.

**GENERAL INFORMATION**

Employees in this classification 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)**

Extensive knowledge of accounting and auditing procedures.

Skill in analyzing and interpreting laws, rules, and regulations and applying them to retirement/pension system.

Skill in conducting interviewing and counseling sessions involving complex legal issues related to retirement/pension systems.

Skill in communicating orally and in writing with a variety of people, answering questions, and explaining information and decisions made.

Skill in making effective oral presentations of retirement system subject matter.

Skill in conducting detailed analysis of work in order to make benefit recommendations.

Ability to review work of others to determine accuracy and adequacy of recommendations.

Ability to testify in Court or at divorce/disability hearings.

Ability to develop training materials, coordinate, plan, and conduct training or informational meetings.

Ability to work in a one-person office.

Ability to establish and maintain harmonious working relationships with the public, fellow employees, and professionals.

Ability to read and understand medical reports and Court orders.

**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.