

New York State Department of Civil Service
DIVISION OF CLASSIFICATION & COMPENSATION

Tentative Classification Standard

Occ. Code 0134210

Teachers' Retirement Examiner 1, Grade 12	0134210
Teachers' Retirement Examiner 2, Grade 15	0134220
Teachers' Retirement Examiner 3, Grade 18	0134230
Teachers' Retirement Examiner 4, Grade 23	0134240

Brief Description of Class Series

Teachers' Retirement Examiners determine membership eligibility and calculate benefit amounts paid to Teachers' Retirement System members and claimants. These positions are found only at the New York State Teachers' Retirement System.

Distinguishing Characteristics

Teachers' Retirement Examiner 1: entry level; processes and maintains membership applications and information; processes claims under the Teachers' Retirement System.

Teachers' Retirement Examiner 2: first-level supervisor; oversees a section of Teachers' Retirement Examiners 1.

Teachers' Retirement Examiner 3: second-level supervisor; supervises a unit of Teachers' Retirement Examiners 1 or 2 and clerical staff.

Teachers' Retirement Examiner 4: serves as a unit supervisor and supervises Teachers' Retirement Examiners 3; provides technical interpretations and direction to staff when there is limited precedent; resolves the most difficult or sensitive issues with members.

Related Classes

Employees' Retirement System Examiners process and maintain member, retiree, and employer applications and information in the New York State and Local Retirement System. Employees Retirement System Examiners are expected to demonstrate knowledge and familiarity with the laws, rules, regulations, legal opinions, and established written procedures of the New York State and Local Retirement System. These positions are only classified at the Office of the State Comptroller.

Retirement Systems Information Representatives disseminate retirement information to individual members of the New York State and Local Retirement Systems and the New York State Teachers' Retirement System, their beneficiaries, their employers, and employee or retirement organizations.

Illustrative Duties

Teachers' Retirement Examiner 1: reviews applications to determine eligibility for retirement, disability, and death benefits; ensures all necessary documentation is provided when reviewing applications and benefits; calculates amount of benefits due to claimant, which includes determining years of service and final average salary; prepares vouchers for payment of benefits; notifies claimants of determinations; corresponds with local or State agencies, school administrators, physicians, members, and attorneys to clarify questions of eligibility or to request additional information; arranges for doctors to conduct independent medical examinations; explains retirement options, prior service, transfers, loans, and other available benefits to members via phone, email, or in-person interviews; performs on-the-spot benefit estimates for members based on information in members' files and additional information gathered during interviews; applies appropriate sections of laws, policies, and procedures governing the operation of the Teachers' Retirement System; and may train or supervise clerical staff.

Teacher's Retirement Examiner 2: supervises and trains Teachers' Retirement Examiners 1 and clerical staff; monitors and evaluates a section's work productivity; implements new operating procedures; prepares monthly retirement payroll and death benefits; ensures Retirement Report forms are processed correctly by reviewing the salary data used to determine a retiree's final benefit; approves the salary that will be used in the retiree's final benefit calculation and for billing, service credit, and final average salary purposes; reviews the salary data and employment agreement for administrators and superintendents; presents retirement information to school district personnel; responds to questions from teachers, administrators, school business offices, and department staff; assists with editing and processing semi-annual reports from school districts and colleges; utilizes knowledge of laws, rules, and regulations, legal opinions, and written procedures of the New York State Teachers' Retirement System; and performs office records maintenance tasks.

Teacher's Retirement Examiner 3: supervises and coordinates the work of Teachers' Retirement Examiners 1 and 2; oversees a unit and participates in the selection and training of new staff; analyzes and evaluates workload statistics to monitor unit productivity; provides technical directions to staff; conducts seminars to train and assist personnel in the specific application of laws, rules, and regulations; establishes workload priorities by assigning and reassigning cases based on difficulty and deadlines; coordinates the flow of information from other sections; and identifies and seeks resolution of legal and administrative issues with appropriate higher level management.

Teacher's Retirement Examiner 4: establishes overall unit workload priorities; reviews the work of staff; assists in preparing the annual department operating budget by determining staffing and equipment needs; provides statistical reports to management; reviews and interprets reports to analyze workload and workflow of the unit; recruits, hires, and trains new staff; meets with staff to discuss and resolve operational problems; reviews proposed legislation and conducts impact analyses; implements administrative procedures and policies as a result of new legislation and discusses procedural changes with staff; recommends amendments to existing legislation when necessary; performs consultations with members and retirees regarding benefit issues; investigates difficult or sensitive member complaints or concerns; consults with appropriate departments for additional expertise as necessary; presents seminars and workshops to various school districts and to groups of educators on legislative changes; assists in planning and developing the employee manual; and supervises the writing and enforcement of departmental procedures and policies to ensure consistency.

Minimum Qualifications

Teachers' Retirement Examiner 1

Promotion: one year of service in a position allocated to Grade 9 or higher at the New York State Teachers' Retirement System.

Open-Competitive: two years of experience performing at least one of the following tasks: reconciling accounts, calculating payments, collecting and analyzing statistics and information, or explaining policy or benefit information to the public; or either 60 semester college credit hours or an associate's degree; or 30 semester college credit hours and one year of experience as described above.

Teachers' Retirement Examiner 2

Promotion: one year of service as a Teachers' Retirement Examiner 1.

Teachers' Retirement Examiner 3

Promotion: one year of service as a Teachers' Retirement Examiner 2.

Teachers' Retirement Examiner 4

Promotion: one year of service as a Teacher's Retirement Examiner 3.

Note: Classification Standards illustrate the nature, extent, and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all the work

that might be appropriately performed by a class. The minimum qualifications above are those required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum requirements for appointment or examination.

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