New York State Department of Civil Service
Division of Classification & Compensation

Classification Standard

Occ. Code 0131100

Employees Retirement System Examiner 1, Grade 9	**0131100**
Employees Retirement System Examiner 2, Grade 12	**0131120**
Employees Retirement System Examiner 3, Grade 15	**0131130**
Employees Retirement System Examiner 4, Grade 18	**0131140**
Employees Retirement System Examine 5, Grade 23	**0131150**

Brief Description of Class Series

Employees Retirement System Examiners (ERSE) perform and supervise staff in the performance of retirement benefits administration for members, employers, and retirees of the New York State and Local Retirement System (NYSLRS). ERSEs are expected to demonstrate knowledge and familiarity with the laws, rules, regulations, legal opinions, and established written NYSLRS procedures. These positions prepare, understand, and interpret Retirement System written materials and benefit administration functions; communicate benefit information to System members; and support and enhance business processes and tools that facilitate the delivery of retirement benefit administration services and customer self-service requests.

The positions are only classified at the Office of the State Comptroller (OSC).

Distinguishing Characteristics

Employees Retirement System Examiners (ERSE) are classified based upon level of specialized knowledge of retirement benefits, relative difficulty of the assignment, role in terms of determining eligibility, calculating, finalizing and authorizing payment of benefits, and supervision of staff. All ERSEs are expected to develop specialized knowledge of particular aspects of the Retirement System and support the development, testing, and implementation of changes to Retirement benefit administration systems for business process and service delivery improvement as subject matter experts.

Employees Retirement System Examiner 1: entry-level; handles basic eligibility, case processing determinations, and customer inquiries.

Employees Retirement System Examiner 2: processes the full-range of determinations and customer inquiries in the Customer Contact Center; processes

requests for service credit modifications and benefit payments; and typically supervises ERSEs 1, and other clerical staff.

Employees Retirement System Examiner 3: supervises multiple ERSE 2s and/or Office Assistants as unit supervisor; handles more complex transactions.

Employees Retirement System Examiner 4: serves as section supervisor over multiple units led by ERSE 3s; supervises multiple ERSEs 2 and 3.

Employees Retirement System Examiner 5: section manager; supervise multiple sections led by ERSE 4s under the general direction of Retirement Program Administrators 1 or 2; or supports and enhances a broad spectrum of business processes that facilitate the delivery of retirement benefit administration services and customer self-service requests.

Illustrative Tasks

ERSEs 1-5 may provide services in one or more areas of retirement administration, performing some or all of the illustrative duties as described below in the furtherance of providing services directly to customers or supporting other retirement system business areas.

Employees Retirement System Examiner 1

Reviews applications for member benefits and/or service credit and determines initial eligibility, and retirement tier.

Reviews and acknowledges member requests for all creditable service.

Responds to basic telephone and written inquiries and generates acknowledgements to members and employers; receives, reviews, and prepares member correspondence.

Resolves questions concerning inconsistencies, discrepancies, inclusions and/or omissions of data.

Requests necessary employer documentation, member records, certificates, military records and other information for use in calculating benefits.

Registers, reviews, and evaluates requests for previous service credit applying various sections of Retirement and Social Security Laws.

Prepares documentation to support the processing of mandatory, optional, withdrawn and military service credit.

Updates the cost of available previous service based on applicability of various tier-specific sections of the Retirement and Social Security Laws.

Assists in testing system changes to automated correspondence and applications.

Projects and calculates service credit and contribution balances for retirement benefits and military service credit; ensures all calculations are correct and in compliance with relevant laws, policies, and procedures.

Employees Retirement System Examiner 2

Reviews member applications for full range of benefits and confirms accuracy of initial eligibility determinations.

Confirms eligibility and initial benefit payments by interpreting and applying appropriate Retirement System Law, policy and regulation; processes retirement calculations that require application of specialized law and procedure; and finalizes retirement benefit payments.

Determines appropriate updates needed in source data and performs necessary adjustments.

Answers the full range of customer inquiries and responds via telephone, email, and general correspondence.

Oversees the processing of transactions; reviews calculations and work completed by staff and ensures compliance with all relevant policies, rules, regulations, and laws.

Reviews and prepares member transfers to and from other public retirement systems, terminations of membership, and accounts payable beneficiary cases.

Functions as technical supervisor of ERSEs 1 and provides training to lower-level staff.

Ensures the prompt and accurate processing of work unit assignments; acts as the unit's liaison with other units.

Reviews basic calculations and work processed by staff and makes necessary adjustments based upon review of membership data.

May act as a tester for system changes that impact functionality such as automated correspondence, workflow, and system calculations.

Employees Retirement System Examiner 3

Supervises a specialized retirement processing section or unit.

Assigns work and sets unit priorities to ensure proper coverage to meet workload demands.

Communicates changes to applicable Retirement System laws and procedures to staff, and ensures compliance.

Reviews and approves service credit, pensionable earnings, benefit calculations, and benefit payments work of staff, and communicates determinations directly to members and retirees, as necessary.

Works with supervisor to develop and maintain reports and queries for the purpose of quality assurance reviews.

Answers questions and resolves problems of an unusual and difficult nature by phone or written communications.

Resolves complex calculations and reporting issues.

Performs the full-range of supervisory responsibilities.

Functions as liaison with members, employers, retirees, beneficiaries, other retirement systems, and any concerned individuals to share information about the New York State and Local Retirement System.

Identifies, reports, or logs system issues or defects that block or impede efficient solution calculations or case processing.

May audit retirees earnings and service credit for compliance with Retirement and Social Security Law (RSSL).

Develops and tests modifications to existing automated correspondence, workflow, and calculations due to changes in the law.

Assists with the design, development, testing and implementation activities related to the maintenance and enhancement of the retirement benefit administration system and customer self-service portals.

May develop and deliver training modules.

Employees Retirement System Examiner 4

Supervises a specialized retirement processing section, or multiple processing units.

Establishes specific work goals and standards for the section to ensure proper coverage to meet workload demands.

Integrates Retirement Division policy and procedural changes into section operations.

Oversees the editing, correction, and updating of retirement systems database files.

Corresponds with various internal and external officials, as well as members and their representatives to resolve problems that may arise with retirement benefit cases.

Reviews, makes determinations, and performs calculations for unusual cases, such as those that result in retirement systems hearings, or may result in municipal suits.

Reviews and prepares pension payroll memorandums, custom designation of beneficiary forms, and implements Domestic Relations Orders.

Testifies at Administrative Hearings as an expert witness on issues related to assigned bureau.

Identifies and ensures resolution of data processing problems as they relate to retirement processing.

Calculates the cost of employer plan improvements.

Identifies and resolves employer reporting and data processing problems.

Utilizes knowledge of Retirement laws, policies and procedures to assist with the design, development, testing and implementation activities related to the maintenance and enhancement of the retirement benefit administration system and customer self-service portals.

Attends internal, inter-governmental, and association meetings related to retirement system programs and processes as presenter, trainer, or representative.

Develops and presents retirement system information to local government officials to improve the quality of retirement reporting and reduce errors.

Reviews audit findings and risk assessments and works with local governments to resolve errors.

Performs the full range of supervisory responsibilities.

Collaborates with staff in other bureaus to conduct quality assurance reviews, including development of queries, analysis of data, and communication of findings.

Identifies and resolves employer reporting and data processing issues.

Trains participating employers on using the employer portal for enrollment, reporting and billing activities.

Employees Retirement System Examiner 5

Oversees and coordinates the workflow and priorities of multiple retirement processing section's led by ERSE 4s.

Interpret rules, regulations, and laws for staff.

Reviews and interprets system-generated reports, analyzing workload and workflow for assigned sections.

Ensures that staff is following current retirement division policy and procedure to maintain consistent work methodology across sections.

Researches, analyzes, and resolves the most difficult or sensitive problems with retirement benefit determinations.

Testifies at Administrative Hearings as an expert witness on retirement systems policies and procedures.

Communicates employer reporting problems to division management, and status of resolving issues.

Utilizes knowledge of Retirement laws, policies and procedures to supervise and support the design, development, testing and implementation activities related to the retirement system benefit administration system and customer self-service portals.

Implements and oversees policies, plans, and procedures that will improve delivery of service to retirement information system customers.

Resolves questions and concerns of management, and reassigns staff resources to support Retirement Division projects and initiatives.

Interprets feedback from retirement system members, retirees, and employees regarding retirement system policies and procedures.

Sets performance standards and ensures that staff are following current policies and procedures and maintains consistent work methodology across sections.

Oversees quality assurance review findings drafts of reports and recommendations; and may assist with implementation of corrective action plans.

Reviews and analyzes pending legislation for possible impact on section operations and retirement system benefit determinations.

Reviews feedback from members, retirees, and employers regarding retirement system policies and procedures.

Performs the full range of supervisory responsibilities.

Minimum Qualifications

Employees Retirement System Examiner 1

Open-Competitive: one year of experience either reconciling accounts, calculating payments, collecting and analyzing statistics and information; or explaining policy or benefit information to the public.

Promotion: satisfactory completion of a one-year traineeship.

Employees Retirement System Examiner 2

Open-Competitive: two years of experience either reconciling accounts, calculating payments, collecting and analyzing statistics and information; or explaining policy or benefit information to the public.

Substitution: an associate's degree may substitute for two years of experience.

Promotion: one year of service as an Employees Retirement System Examiner 1.

Employees Retirement System Examiner 3

Promotion: one year of service as an Employees Retirement System Examiner 2.

Employees Retirement System Examiner 4

Promotion: one year of service as an Employees Retirement System Examiner 3.

Employees Retirement System Examiner 5

Promotion: one year of service as an Employees Retirement System Examiner 4, or Retirement System Information Representative 1 or 2.

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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